Volunteers

- Volunteers/How to find, select and train
- Selection of material from Volunteer Kit

  FIRST CALL FOR HELP
  Community Information & Referral Service
  Minneapolis, Minn.

- Questionnaire used by LINK Information Centre for volunteer self-evaluation
- NIP (Neighbourhood Information Post) Handbook for Volunteers
- Community Awareness — a Series of competency based learning activities for Field Workers — Ministry of Community and Social Services

Ontario
Ministry of
Culture and
Recreation

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The attached is a selection of material from a kit which is given to new volunteers at:

FIRST CALL FOR HELP
Community Information & Referral Service
404 South Eighth Street
Minneapolis, Minnesota

Dear Volunteer,

Welcome to Community Information and Referral Service. I'm so glad you have found the time to work with us. I believe that you will find this a very rewarding involvement.

As you know, CIRS is a telephone information and referral service serving people and agencies with problems regarding housing, family, day care, health, welfare, education and recreation. It will be your goal, as a volunteer, to become completely familiar with our resources so that you will be able to give the best possible help to your caller.

In order to assist you in reaching this goal, I have enclosed a folder with material for you to study as listed below:

1 - Agenda for Training Session
2 - Job Description for Volunteers
3 - Names of CIRS staff and position
4 - Background and organization of CIRS - Volunteer Committee
5 - Office Procedure Sheet
6 - Interviewing Instructions
7 - Definitions of Program Service
8 - Definitions - Index Titles
9 - Program Services - Codes
10 - Day Sheet Instructions
11 - Day Sheet
12 - Case Card Instructions
13 - Case Card
14 - Most frequently asked questions and sample questions
15 - Resources
    1 - Damage Deposit
    2 - New Legislation
    3 - Housing Legislation
    4 - Legal Service Agencies
    5 - General Information Sheets

This material is yours to keep and update as needed during the year.

Please study the enclosed material and bring it with you.

I am looking forward to seeing you and to working with you this year.

Sincerely,

Gwen Lichty
Volunteer Coordinator
340-7436

GL/lh
enc. : folder

COMMUNITY HEALTH AND WELFARE COUNCIL OF HENNEPIN COUNTY, INC.

COMMUNITY INFORMATION AND REFERRAL SERVICE

INSTRUCTION SHEET FOR INTERVIEWING

ı your contact with clients, remember at all times that you are speaking for :RS not as an individual, and that you are CIRS to the caller. Never react ith surprise or panic to any information given. Be controlled at all times. ıke information in a relaxed way even though the situation seems emergent; :laxation tends to rub off on the caller. If caller is excited, :ercise patience while he calms down. Get full information; be clear about ıat the person is really asking for.

. Answer the phones, "Community Information and Referral Service, May I help you?"

. Let them tell you their problem first. If client is not reluctant to give name ask them as we may have to call back to follow-up services. If caller is using a pay phone, get number and agree upon time to return call. Let nothing interfere with any return call. Get full information about the problem and consult with staff while the caller is on hold if necessary. If caller is reluctant to give name, do not insist.

. Only give out the information from resource file provided. <u>Do not give personal advice</u>.

. Try to be brief, but get story as completely as possible. Find out if and where caller has looked for help before or if he is active with an agency.

. Refer to resource file and/or the Community Service Directory - turn to proper section and page and read all pertinent information on subject. Explain it to caller if necessary.

. Refer caller to appropriate agency - voluntary and/or public - as the need demands. Be sure to give enough information to assure that the caller reaches the proper source for help. (example: telephone extensions, specific departments, etc. where necessary)

. Instruct caller to tell agency source that "CIRS" referred me to you.

. If you are unable to find the answer to caller's problem, consult staff while caller is on "hold". <u>Never Say</u> "We can't help you on that."

. If information is not readily available, tell caller we will call him back - check where and when he can be reached for follow-up call. (See item 2 above)

. Check and fill out day sheet or case cards.

. Submit both reports to Volunteer Coordinator at end of period.

DO YOU KNOW THE ANSWER ? ?

SAMPLE QUESTIONS

1. Can you help me get a lawyer?
2. I'm pregnant - will Medicaid give me any help?
3. I want to go to college, but I don't have the money
4. How do you become an American Citizen?
5. The insurance company won't settle my clain.
6. My daughter stutters, is there anything I can do?
7. I dropped out of school, how can I get back in?
8. The moving company banged up my furniture, can I make them pay?
9. Where do you go for birth control information?
10. I was taken by a door-to-door salesman
11. Somebody junked a car in front of my house.
12. Where do I go for a cancer check-up?
13. I'm black, and they won't rent me an apartment
14. They are always telling ya 'write your congressman' - Who's mine?
15. What do I do - a dog just bit my son?
16. I want to start my own business, but I'm not sure how to begin.
17. My Social Security check didn't come this month.
18. My wife and I aren't making it.
19. We want to adopt a baby.
20. Where does an old man like me go to pass his time?
21. Is there a Headstart Program in my neighborhood?
22. I need a business loan.
23. You should have seen the way that cab driver treated me.
24. I heard a veteran can get a tax exemption on his house.
25. Where can I get a free chest x-ray?
26. Where can I find out about natural childbirth?
27. Some outfit sent me some stuff I didn't order
28. How can I get my birth certificate?
29. I've got some good clothes I'd like to give to somebody
30. Can I go to school nights to get my high school diploma?
31. My husband's an alcoholic, what can I do?
32. Is there an all-night drugstore in my neighborhood?
33. What is the emergency poison control number?
34. I am black, and they won't let me in the union.
35. I'm not married, what will I do when the baby comes?
36. Is there any way I can get the money to buy my own cab?

MOST FREQUENTLY ASKED QUESTIONS

1. Where can I find out information on foster care? I heard about being a foster home on TV.
   a) Ask the caller what county he lives in and refer him to that county's Welfare Department--numbers listed on bulletin board or Volunteer Book.
2. I want the book you put out on community resources and agencies.
   a) Tell caller the book costs $3.00--he may come in and buy it or send us the $3.00 and we will send it to him.
3. Where can I find a Senior Citizen's group near my home?
   a) Ask him his name and address and send out our book "Action For Seniors" to him.
4. Are you the Senior Citizen Center? I want Senior Citizen information.
   a) Refer him to the Senior Citizen Centers - 339-7581
   b) Midge Keegan is a specialist on aging so refer to her if the Senior Citizen wants to discuss problems you can't answer or just wants to talk to someone about his situation.
   c) Look in book "Action for Seniors" for other Senior Citizen information also Reduced Prices pamphlet.
5. Where can I get a free pregnancy test?
   a) Get as much information as possible on this one - get entire picture of situation if you can.
   b) Refer to teen-age medical facility nearest them or nearest clinic listed on microfiche.
   c) Can be referred to Planned Parenthood
   d) See if active with an agency - if not:
      HCWD
      Lutheran Social Service
      Catholic Welfare Services
      Family and Children's Service
   could be mentioned for on-going social worker.
   e) This is a delicate question so handle carefully!
6. How do I get my damage deposit back?
   a) According to law it should be returned within 14 days after leaving with 5% interest (or a statement of why the landlord is withholding the deposit) (S.F.965) Landlord may withhold only the amounts reasonably necessary to remedy tenant defaults in rent or other funds due landlord or restore premises to condition at beginning of tenancy.
   b) Landlord may be sued in conciliation court.
7. I gave notice to my landlord but he wants months. rent.
   a) Proper notice is day before rent is due for notice for following month - Ex. Aug.31 for Sept. 1, notice & Oct. 1 moving.
8. How do I find a day care center in my neighborhood?
   a) Find out information on situation - is mother going to work? Is there a father? Does she need all day care? Does she need a nursery school instead? Are there problems with the child? Does it pay for her to go to work?
   b) If just a regular situation where a day care center is what she wants ask for zip code and give names of day care centers
   c) If not regular situation - nursery schools are listed, Montessori Assn. could be a referral, counseling could be a referral.

   d) Licensed foster family day care - call HCWD 348-6688
   e) If a father calls for day care - question if he has a wife etc.-what is situation - possibly a homemaker would be better for him depending on ages of children and his situation.

9. My mother is unable to fix a good meal for herself. Can I have information on meals brought to the home?
   a) Find out situation - then ask for address etc.
   b) Find address on meals map in the office and refer to proper agency according to area.

10. Where do I sign up for low cost housing? Where do I sign up for Senior Citizen's Hi-Rise?
   a) Refer to Minneapolis Housing Authority - 348-2525.

11. Where can I get a book listing my rights as a tenant?
   (a) Send for book "If You Pay Rent You Have Rights, Too" -
   (send 50¢ to Minnesota Tenants Union,
   (
   (b) Send for MPIRG book to Minn. Public Interest Research
   (Group, 3036 Univ. Ave., Mpls. 55414, "Handbook on Tenants
   (Rights in Minn." $1.00

12. I need help in finding an apartment.
   a) If on AFDC refer caller back to her FT (financial worker) and refer her to Henn. Co. Welfare Dept. Housing -
   b) Refer to Apartment Guide - 927-8637,8638,8639.
   c) Refer to Mpls. Housing Auth.-348-2525
   d) Suggest getting the paper early - such as Saturday night.
   e) Suggest driving around area desired etc. We have no list of apts. to give out - we will help in particular on housing for a Handicapped person- See yellow Housing book.

13. I am a Senior Citizen - how can I ride free on the bus?
   a) Show the M.T.C. your medicare card
   b) If no medicare card - an ID card may be obtained at any Drivers License Examining Station
   c) For information on M.T.C. call 827-2621
   d) Other free or discounted services and recreation for Senior Citizens listed in "Action For Seniors" and Reduced Prices publication. (Both can be sent out).

GENERAL INFORMATION

If you want to make changes in the resource file - obtain the proper form - fill out and put in Judy & Vivian's box.

Please make out case cards - 1) on all cases you refer to agency 2) cases you want to follow up 3) cases that will be calling back

Use referral cards on cases you refer to specific agneyc - they are the best follow-up

One volunteer sit at Lucille's desk at 11:30 when she goes to lunch

If caller believes we are the Housing Authority refer him to 348-2525

If caller believes we are the Senior Citizen Center refer him to 339-7581 - our phone number is listed under Senior Citizen information so we do get these calls

Each volunteer keeps a list of general information tips & facts to be passed on to others

When you receive a referral card back - make note of what it says on case card and give referral card back to Gwen

Give all case cards to Gwen - tell her which ones you want her to follow-up -otherwise you will be expected to follow-up your own cases - they will be in card file

When another agency or worker is active on a case - refer caller or case to staff as we are cleared for confidentiality to obtain information from other agencies - it is best practice for staff to handle case.

Do not give your first name to clients - give your <u>last</u> name

Listen to the caller - <u>slow</u> <u>down</u> and <u>listen</u> - let him tell you his story - ask questions to find out information you will need - example:

1) Where you live?
2) How are you supported?
3) How old are you?
4) Children? Ages?
5) Marital status

We <u>care</u> about the caller - don:t panic - keep your cool and <u>listen</u> - listen beyond just what they are saying - you are the first contact the caller has you must be a person with whom he can easily communicate - be flexible - be ready to perceive new combinations of services to approach each problem with a new and fresh look.

Don't put them on hold while you discuss their situation or spend time finding resource - tell them you will call them back

Clean off the table at the end of the day - empty ashtrays etc. and cover microfiche and pile resource books neatly etc.

There is a box in the office on the radiator that contains all the latest bulletins etc. on different agencies - <u>read</u> these when you have time between calls - be sure to put them back in the box

____ Put full date on case cards - 7/17/76 - these are kept for a few years so we must know the entire date

____ Do not use red ink on either case cards or day sheets

____ Check temporary file - many temporary groups

____ On checking age of client:

if call for nursery school for example - the client is the child

if call for Day Care as mother wants to work the client is the mother

if call for nursing home the client is the patient

if call for housing the client is person housing is for

____ There are too many 92's - think of what service is needed and put in that category only use 92 as a last resort

____ Remember to use file folders on agencies for more information - supplemental information and pamphlets, etc.

____ Remember to always look for a case card in the file - we very likely have had a previous contact with callers with multiple problems

CIRS - OFFICE PROCEDURE

1. Go to Gwen's office
2. Talk to Gwen about new resources, new procedures, special projects, changes in current referrals and important clarifications.
3. Report to desk by 9:30 (12:30 for p.m. volunteers)
4. Take out Day Sheet, Scratch paper and Case Cards
5. Check bulletin board for new resource material
6. Check Notebook and desk for new resource material
7. Use card - address? children? as a guide to make sure you find out full situation of the caller.
8. Make out CIRS referral card on cases you wish to personally refer - send out with cover letter or give to client on walk-in.
9. Check card file for card on caller with previous contact with CIRS
10. Check current file for your call-backs (keep your own list of cases to follow up)
11. Finish call-backs in between phone calls - at end of the month try to have all cards closed out if possible
12. Give caller your name, Mrs. ____, not just your first name
13. Check in with Gwen at end of shift - bring day sheet and case cards to her

HOW TO USE THE PHONES

We are on a Centrex telephone service. The agency number 340-7431 rings on the first number and then rings all the way down depending on which lines are busy.

1. Pick up 7431 and 7432 on the first ring.
2. Wait until the second or third ring on 7433, 7434, 7435, 7436 and 7437 to give the staff person assigned to those numbers a chance to answer if they are at their desk.
3. Give the 340-7431 number to your baby sitter or 7436 (Gwen's #)
4. Use the bottom numbers 7438, 7439 and 7440 for call backs. Dial 9 for outside - then the number you are calling.
5. If you wish to place a call on HOLD - press the HOLD button (red one at the bottom) down firmly - a call on HOLD flashes faster than an incoming ring. Do not place a call on HOLD if you are going to take some time to find the resource. It is better to call them back.

   Place a caller on HOLD when discussing with someone so they cannot hear discussion or office noise.

   If a caller should be referred to an agency or person in the Citizens Aid Bldg. on the same Centrex system the call can be transferred as follows:

   (a) Depress the receiver button once
   (b) Listen for special services dial tone
   (c) Dial the desired extension
   (d) Announce the call (explain to person that you are transferring caller to him)
   (e) Depress receiver button once - make sure caller is connected by saying - "go ahead etc."
   (f) When caller and third party start talking - hang up
   (g) If you want 3-way conversation stay on the phone.

   If you wish to consult another person:

   (a) Ask your caller to wait while you call another number
   (b) Depress the receiver button once
   (c) Listen for special services dial tone
   (d) Dial desired number
   (e) Consult with third party
   (f) Third party hangs up
   (g) Depress receiver button once
   (h) Original Call reconnected

On transferring calls etc. if you encounter a "busy" or "don't answer" at the desired 3rd telephone depress the receiver button twice - once to bring the caller back on the line and once to eliminate the "busy" or "ringing signal".

AGENCIES IN CITIZENS AID BLDG.

1. Family and Children's Service - Intake- 7494 -- Agency - 7444
2. Catholic Welfare Services - Intake-7512 -- Agency-7500
3. Voluntary Action Center - 7532
4. Big Brothers - 7407
5. Big Sisters - 7606

DIRECTORIES YOU WILL USE

1. Day Care - full-day and half-day by counties and zip code
2. Hennepin County Welfare directory
3. Senior Citizen directory
4. MPIRG book and other tenant-landlord books
5. Housing book
6. Volunteer Notebook of Misc. Information
7. Meals on Wheels book

VOLUNTEER-JOB DESCRIPTION

Helping phone clients solve their problems by -

a. Referring them to the proper resource

b. Making collateral calls

c. Giving them information

d. Brief casework

e. Following up on disposition - using case card file

f. Occasionally making appointment for client at resource

g. Being an advocate for them

Keeping statistical records

a. Day sheets (give to Volunteer Coordinator at end of day)

b. Case cards (give to Volunteer Coordinator at end of day)

c. Checking case card file for clients in case they are previously known

Taking responsibility for 340-7431 phone and being alert to other extensions not being answered.

Read Staff Minutes, current clippings, brochures, Newsletters, etc. plus initial Volunteer Training material .

Fill out proper forms (C-100) for changes to be made in microfiche and give to Resource Unit.

Transmit to Director any cases of unusual interest or information helpful to the whole staff.

Check and cooperate with entire staff to see that there is adequate coverage at all times - phones and front desk.

Assist in preparation of Senior Citizens Directory, brochures and other PR material.

Speak or show film on CIRS, participate in Fairs, etc. explaining our services on a Volunteer basis.

Being alert to getting on mailing lists for Newsletters, brochures, etc. CIRS should be receiving.

Confer with Volunteer Coordinator as to progress of volunteer experience and satisfaction.

Mail out print-outs for resource up-dating.

Check monthly microfiche when requested for errors.

14. See that Volunteer book is up to date and useable - if you want any changes - see Volunteer Coordinator.

15. Discuss any or all complex requests with Volunteer Coordinator or professional staff.

16. Meet with Coordinator before and after assignment!

17. In case of necessary absence notify volunteer coordinator as far in advance as possible and try to arrange a substitute.

18. Fill out forms for computer

19. Give current or important items to Volunteer Coordinator for newsletter

20. Maintain Volunteer desks in neat and orderly manner

21. Be able to make decisions as to which cases to handle and which to refer to professiona staff. When in doubt- ask.

22. Attend all training sessions

SAMPLE QUESTIONS MICROFICHE EXERCISE

Read question - decide where you would find resource in Index and decide best possible resource.

1. I need to file bankruptcy or something as I can no longer handle my bills. Where would you look in Index? 1. ______________________

 2. ______________________

 What Agency would handle bankruptcy? 1. ______________________

 2. ______________________ 3. ______________________

 Other ______________________

2. I am 15 years old and would like to write to a 15 year old boy in England.

 Where would you look in Index? ______________________

 What would be the best referral? ______________________

 What is intake procedure ______________________

 Other ______________________

3. I would like to live for awhile in another country or have a teenager from another country live with me. Where in Index? ______________________

 What Agency? 1. ______________________ 2. ______________________

 ______________________ What is intake procedure ______________________

4. I want to find out something about possibly donating a kidney to someone.

 Where in Index? ______________________

 What agency? ______________________

5. I have just gotten out of the service - I want to get a high school diploma by taking a test if possible. Where in Index? 1. ______________________

 2. ______________________

 What agency? 1. ______________________ 2. ______________________

6. Where can I get immunization shots for my 3 year old child for little or no cost? I live in Robbinsdale.

Where in Index? 1____________________ 2____________________

What agency?______________________________________

7. I have heard of a Lechi something - a group that helps women with breast feeding.

Where in Index? 1____________________ 2____________________

What agency?______________________________________

8. I'm pregnant - will medicaid give me any help?

Where in Index?______________________________________

What agency?______________________________________

9. My employer does not pay me the minimum wage - who can I talk to?

Where in Index? 1____________________ 2____________________

What agency?______________________________________

10. Where can I get a Minnesota drivers license?

Where in Index?______________________________________

What agency? ______________________________________

11. Where can I go to school to learn to be an LPN (Licensed Practical Nurse)

Where in Index?______________________________________

What agency?______________________________________

12. My husband left -- I have 2 small children - can I receive AFDC?

Where in Index?______________________________________

What agency?______________________________________

13. My child 11, needs dental care. We live in South Mpls. across from Seward School. We cannot afford it.

Where in Index?______________________________________

What agency?______________________________________

Where can I get my birth certificate? I was born in Minneapolis.

Where in Index? ______________________________

What agency? ______________________________

My dog has been hurt and I can't afford a Vet - I live by St. Mary's Hospital.

Where in Index? ______________________________

What agency? ______________________________

My daughter is blind - she needs a social group.

Where in Index? 1 ______________ 2 ______________

What agency? ______________________________

I want to join a club to quit smoking.

Where in Index? 1 ______________ 2 ______________

What agency? ______________________________

I have been out of Anoka State Hospital for 6 weeks but I believe I need a friently group who can give me moral support. I live in North Minneapolis.

Where in Index? 1 ______________ 2 ______________

3 ______________________________

What agency? ______________________________

I am a Homosexual and a Catholic. I understand there is a special group for me.

Where in Index? ______________________________

What agency? ______________________________

We just buried my baby grandchild. He just died in his sleep. Is there a group for parents to help us?

Where in Index? 1 ______________ 2 ______________

What agency? ______________________________

The What And Why Of Follow-Up

What is Follow-Up?

Follow-up seeks to renew contact with a person who has been informed about and/or referred to a service to determine if he has been linked successfully to the service he needs. Implicit in follow-up is the desire to know how the person is doing, if the agency did or could provide the requested service, and if the center has fulfilled its mission. Follow-up also provides an opportunity for you to help the person again if your first effort failed, or if new needs arise.

Why Do Follow-Up

As you already know, linkage of people to services may not succeed for several reasons. A person may change his mind about his need for an agency's services. He may have had his problem resolved in other ways. He may have had an accident that prevented him from acting on the information you gave him or the referral that you made for him. Perhaps he felt uncomfortable about actually going to an agency for help, and decided he did not want to go. The services to which you referred him may have been inappropriate to his problem or possibly he was unable to state his problem in such a way that the agency could effectively respond to it. An agency's policy may be too restrictive; or its personnel may be inadequately trained or uncaring in regard to people's needs; or its practice too limited and rigid. Any one of these reasons could prevent the person from being linked to services he needs. Thus, follow-up is necessary, not only to learn if the person has been linked to the service he needs, but if not, why. Unless you learn why the person did not obtain help, you cannot know what further action you should take in any given case.

Action that may be needed as a result of follow-up may include any of the following:

- correcting the resource file or bringing it up-to-date
- dropping the person's case
- giving the person new or different information
- referring the person to a different agency
- calling the agency to which the person was originally referred to discuss the agency's disposition or non-acceptance of the individual's case
- providing additional encouragement to the person to get help
- providing escort service for the person to the agency
- recording instances of non-existent services and unmet needs

Thus, follow-up is designed to:

- get services for people who did not get them the first time
- make agencies more accountable for their service
- secure planning information which sometimes leads to:
    - advocacy
    - research studies
    - new services

Follow-Up Process Or How You Do Follow-Up

Follow-up begins where information-giving and referral leave off. The process used in follow-up has already been suggested to you. You have already provided the person with information about the community provision best suited to his needs or have referred him to it. Now you want to know if he followed through on the information you gave him or the referral you made for him and,

if so, if he was able to obtain the service or provision he needs.

Returned Referral Form

The returned, completed referral form that you sent to the service agency should tell you if the person got to the agency to which you referred him and if he was accepted for service. If the referral form is not returned to you within a given period of time, such as two weeks after the referral was made, you should contact the person to find out what happened. The tagged personal record cards should tell you when individual referral cases should be followed up.

Follow-Up With Individuals

Follow-up should be done routinely with persons whom you have referred for services in order to learn directly from them if they are getting the services for which they were referred. This includes those individuals whom you directed to a specific agency without going through the formal referral process of completing a referral form. Follow-up is especially imperative in those instances where a referral form has not been returned by the service agency.

Ideally, follow-up with individuals should be done by calling them on the phone. However, if the person is not reachable by phone or if you have tried to reach him by phone unsuccessfully for at least three times, mail him a follow-up form. This should be returned to the center in a stamped, addressed envelope to protect the person's privacy. Whether follow-up is done by phone or mail, what you want to know is:

- did the person get the services for which he was referred
- if not, why not

. and if not, would he like to consider other possibilities

. if yes, is he satisfied

After completing your contact with the individual, check the appropriate spaces on the personal record form regarding service found or not found as part of your ongoing record-keeping responsibility. If in follow-up you learn that the person is not really interested in linkage, his decision should be respected and the matter then should be dropped. Otherwise follow through as earlier indicated and as listed under activities resulting from follow-up. Always remember to state who you are and your identification with the center when you call. Then proceed to state the reason for your calling.

Follow-Up With Agencies

The agency's response on the returned referral form will indicate the degree to which you should pursue follow-up with an agency on any given case. If the response is clear and/or if the person is receiving or has received service from the agency, this is all the follow-up you need to do with the agency. If the response is not clear, however, or if the person is not receiving or has not received the service from the agency, call the agency's contact person to discuss the case with her or him, particularly if you have any question about the agency's decision. This will provide you an opportunity to work through misunderstandings about the case under consideration or to correct misinterpretations of an agency's function or policies. Also, if resource file information is inaccurate, this will give you an opportunity to correct it. As in follow-up with individuals, be sure to identify yourself and your affiliation with the center before you begin. Then state your reason for calling.

While follow-up may increase agency accountability and provide the center

with a mechanism for monitoring its work, it must be done carefully, tactfully, and purposefully. Although agencies should be expected to conscientiously follow through on follow-up with a referring agency, there is a limit to the amount of time any one agency can be expected to spend on any given case, including follow-up activity on it with the center. One follow-up call per case should not cause any problem.

Conslusion

Follow-up can be a time-consuming process. Yet it is an important component of the total I & R service. It fulfills the dual purpose of determining whether linkages between people and services have been made and also of monitoring the center's work. Once you have followed through on reasons for linkage failures that are related to the person himself, such as fearfulness, disinterest, physical incapacity, etc., the question then becomes what to do about linkage failures resulting from:

- non-existent services
- agency malperformance or non-performance
- restrictive or punitive public policy

This leads to the question of advocacy and its place in the center's program.

This handbook is designed to give the new volunteer an introduction to the Neighbourhood Information Post and serve as a tool which you, the new volunteer, can use as you start working with us.

As you become more familiar with your job & N.I.P. you may find that some parts of the handbook were lousy and you'll probably be right - so we're hoping that you'll voice your criticisms & participate in the designing of an updated version in the future.

Good Luck!

The Volunteer Handbook Committee
Jack, Sue, Heather & Bill

"The Need for Neighbours"

There are many casualties in our modern society whose cries are never heard. They are the people lost in the concrete jungle; or suffocating in the swamps of form filling; or wandering in the tangled maze we call red-tape; or bruised by the buffeting process we call passing the buck; or they are just paralyzed stiff, by the sheer bigness of things; of buildings, of business, or bureaucracy, of the bally-hoo we build around our social conventions.

Way back in a rural community everybody was a neighbour. Everybody cared. When a baby was born everybody helped fill a basket. When someone died the neighbours came in to "do" for that person. In a natural setting neighbourliness was natural. It was the done thing.

But in our urbanized society this is not so. Apartment living - to take urban life at its extreme - makes for apartness. It breaks up belongingness.

In consequence the channels, the invisible network of neighbourliness, are broken. There are no outlets for care. This is bad for people. Because people have a need to care. Caring for other people is not only good for the person being cared for. It is also good for the person who cares. And the people who don't care suffer from a human deficiency that is detrimental to their personal well-being.

There are many people in our community who want to help. Yet themselves feel helpless for want of know-how, or lack of machinery to enable them to help. We have to create for such people new channels of caring.

This we are attempting to do through our "Information and Referral Centre". Many citizens have worked enthusiastically in the planning and development of N.I.P. We have received all manner of good will and pledges of co-operation from both statutory and voluntary agencies. But volunteers are vital. First, to be trained - because organized neighbourliness requires skill as well as sympathy. Then, to give some time each week to help provide a regular network of neighbourliness throughout our community.

"WIRC Handbook"

The role of the local information centre

The local information centre evolves out of the neighbourhood in which it operates, reflects the character of the particular neighbourhood and is responsible to it. Their primary function is the provision of information about community services and other matters, and referral to appropriate resource.

Each neighbourhood information centre differs in its programme and its priorities, reflecting the needs of the particular community. However, they have a flexible helpful approach, and if they do not have the answer for an enquiry then they will try to find one. In addition some centres offer one or more secondary services - legal aid clinics, counselling etc.

Local information centres maintain information about local services and activities which cannot be maintained on a Metro wide basis. Because of the close contact with the agencies and organizations in the area, there can be a mutually helpful exchange of resources and services to provide more direct, effective, and personal service to the public.

A walk-in facility, which is often more effective in meeting clients' needs, is usually available through the neighbourhood centre, and is, of course, more geographically accessible to the people. A few centres provide service in one or two languages other than english because of the nature of their communities.

As well as providing information and referral services, local information centres can respond to community needs, and even personal needs of clients, by harnessing local resources and voluntary manpower to provide practical day to day services not provided by any other organization in that area --- for example rooms registries, odd job registries, volunteer drivers, income tax clinics, debt counselling, interpreter services, immigrant aid services, help with application forms etc.

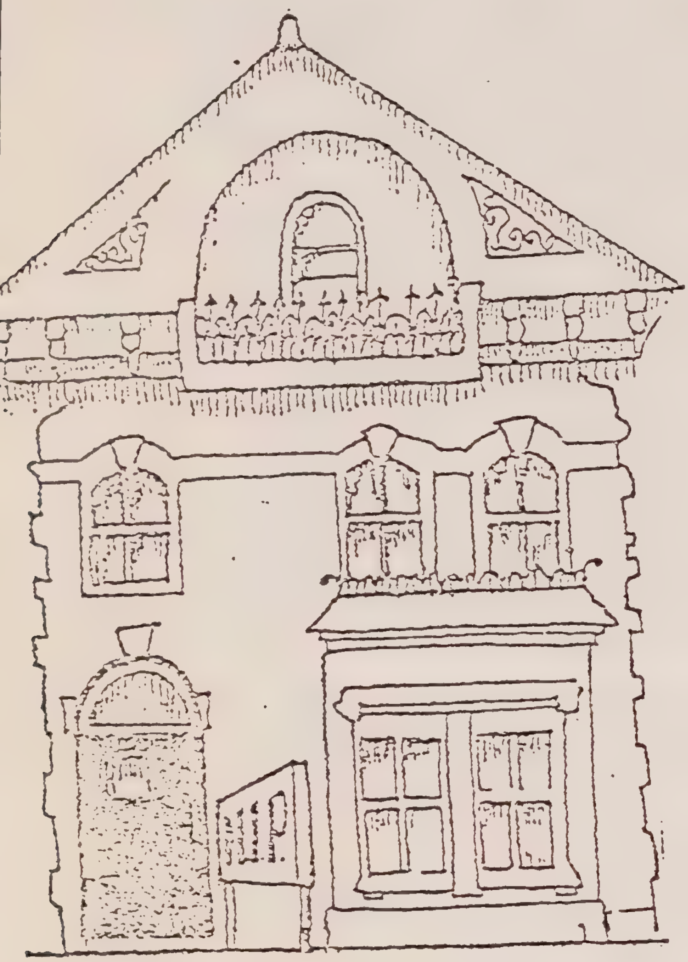
One of the reasons for local information centres, in all of their different forms, being necessary is their better contact with the communities and people served, their emphasis on helping, and their flexibility to do whatever is needed.

Often local information centres will work together, and when appropriate there is often co-operative action on client's enquiries. In Toronto a Federation of Community Information Centres has been formed. NIP is a member of this organization.

HISTORY OF THE NEIGHBOURHOOD INFORMATION POST

The Neighbourhood Information Post opened in July, 1970 as a result of a number of concurring factors: a) recommendation of the Don District Study b) co-operation and interest of the Toronto Public Libraries and c) expressed need of local groups, individual residents and the local inter-agency council. From its earliest beginnings, NIP has had strong agency support as well as that of residents within the community.

Staffing at NIP was almost entirely voluntary for the first year of operation. The services of a Library staff person were made available to help with co-ordination. Now NIP has come full swing through LIP and OFY grants which employed six staff and back to subsistance grants which manage to salary 2 full time staff. At present the Post relies heavily on volunteers who commit themselves to a morning, afternoon, or evening shift per week.



NIP serves the whole of Ward 7 specifically, as well as the peripheral areas of Toronto's downtown core. The population of this widely diverse ward is approximately 60,000. The area includes large segments of public housing (Regent Park, Moss Park, St Jamestown), locally planned urban renewal projects (Bain Ave., Spruce Court, Trefann Court, South of Carlton), low income housing co-operatives (DACHI, Don West Neighbours), a large rooming house population, many lower income private homes, and a newly emerging area of housing being renovated by middle and upper income professionals in the Don Vale and South of Carlton areas. The population includes an interesting number of Chinese, Greek, East Indian, Arabic, Philipino, and Native Indian inhabitants, as well as a number of French speaking migrants from the eastern provinces. The area is in an almost constant state of flux. While previously, the most common queries dealt with UIC, housing, welfare, and other benefits, NIP is now answering many more questions concerning recreational and educational facilities, as well as questions by newcomers to Canada regarding basic services such as where to find a family doctor, how to obtain legal advice, and where to contact ethnic service groups.

Since its inception, the Neighbourhood Information Post has been governed by a Board of Directors who are responsible to a constitution. NIP was incorporated in 1972 and is registered as

charitable organization. The Board members have always been drawn from within the community, either as residents or as workers. Also each member has either volunteered or formerly worked at the Post and so has an intimate working knowledge of its day-to-day operations. The Board of Directors is responsible for areas such as funding, hiring of staff, and basic policy which affects the internal organization and the role of the Post within the community.

Job Description of NIP Volunteer

1) Gathering and Updating Information-It's a never-ending process keeping on top of changes in services. Volunteers will be regularly calling or visiting groups to expand and check the information that we have on file.
2) Recording Information -typing & filing the information onto cards for the files.
3) Answering the inquiries of people who phone or drop in to the Post for help.
4) Representing NIP at community meetings.
5) Participating in Publicity campaigns-could involve distributing pamphlets, writing an article for NIP for publication in newsletters etc.
6) Recruiting & Training of future Volunteers-Plan future training sessions, teach new volunteers etc.

Rules & Procedures for the NIP Volunteer

1) All volunteers must fill out an application form.
2) Each volunteer will be contacted by the Volunteer co-ordinator for a personal interview.
3) On the basis of this interview those eligible for training programs will be selected.
4) Volunteer training programs will be held regularly or whenever there are enough volunteers to take a training course.
5) Volunteers will be expected to attend volunteer meetings held every 4-6 weeks. These sessions will be to share information & experiences with other volunteers & staff and serve as training sessions (e.g. a seminar on U.I.C. or Welfare Law)
6) Volunteers are expected to work a minimum of 1/2 day per week and a maximum of 1 day per week.
7) Each volunteer will have Two Substitutes whom they are expected to contact for replacement in the event that they cannot attend their shift.
8) Notify the Post of any substitution-If you can not get in touch with the Volunteer co-ordinator immediately.

Remember:

That your work and any information received through client inquiries is Confidential.

Some HELPFUL HINTS!

There's a real art in giving information. People often come to us uncertain about what they need and uncomfortable about asking for help. So not only does one need to be familiar with all available resources but also have the required skills to draw out the heart of the problem and put the inquirer at ease.

Characteristics We Look for in Volunteer Information Counsellors

1) Common sense & resourcefulness
2) Ability to create a friendly atmosphere
3) Enthusiasm, warmth & a willingness to help
4) Ability to accept the need for help, to listen patiently & keep things in CONFIDENCE.

HELPFUL HINTS!

1) Make sure you understand the person's question. Pick out the heart of the problem. e.g. Someone may come in asking about lawyers for divorce proceedings. Once you get talking you may discover that in reality the person would rather have a family counsellor.

2) Be certain you know all the details necessary to make a good referral. A U.I.C. problem? Bureaucracies won't respond to a problem based on incomplete facts. Be sure you're armed with all the details-person's name, address, S.I.N.#, phone #, and any relevant dates and correspondence.

3) Accurate information. Check the date on the information you're handing out. If it hasn't been checked recently, then call first & verify what you have before you pass it on.

4) Complete information. Try to give the caller the fullest information about the service you're referring them to - hours, contact person, possibility of long waiting lines, alternative resource if first one doesn't work out etc.

5) Never say No. No problem is too small or insignificant if someone has taken the time to ask for help with it.

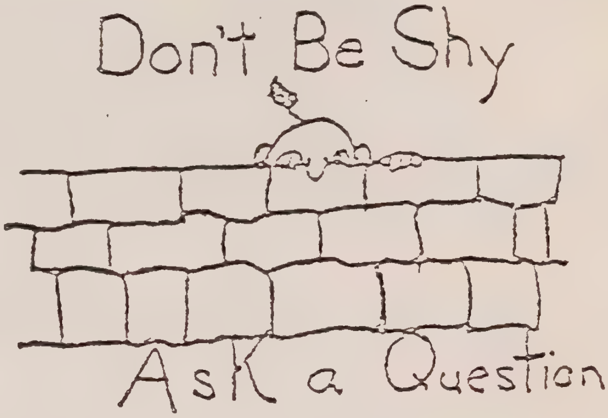
6) Share questions & ideas. If a question comes up and you haven't the slightest idea where to look for answers ask others in the Post for ideas or call appropriate people in our "People file."

7) Advocacy. Our aim is to give people the information to help themselves. But sometimes it may be necessary to take the initiative to act on behalf of the caller. In these cases take the time to let him know exactly what you're doing & how - so that he may learn for the next time.

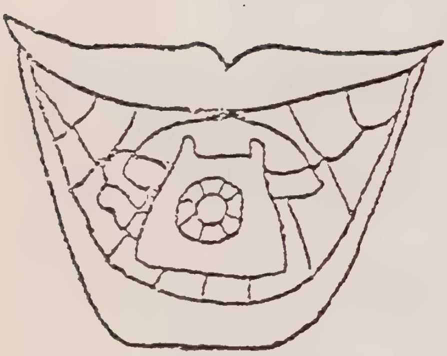
8) Follow-up. When appropriate, ask people to let you know "how things turned out". It shows your concern and also allows us to keep track of the quality of our service.

Remember:

Your personality is the best representative of the Neighbourhood Information Post!



Telephone Personality



Your telephone voice reflects NIP's ability to obtain fast & yet precise information. Therefore when investigating or enquiring about services or complaints there are some rules (?) to keep in mind.

Let your voice reflect:

SINCERE INTEREST- visualize the person you're talking with as an individual. Speak with him not at the telephone. Be enthusiastic - your voice will mirror your enthusiasm.

CONFIDENCE-An assured tone of voice reflects your knowledge and experience in business. "Know what you don't know".

Formal Agencies & Government-It's helpful to use a confident, authoritarian voice. Identify yourself (Mr., Miss, Mrs., Ms.) & your agency. State that you're acting on behalf of client Mrs. X Make sure that you have all the necessary information before you ask for answers.

Community Organizations-Community based groups operate hopefully on a friendly first name basis. Therefore, use your first name - identify your agency - and your connection with it. Be friendly at all times & feel free to enquire about their services.

Remember: Personal contacts result in faster & more effective services!

THE

VOICE

WITH

A

SMILE

WHERE TO FIND INFORMATION IN THE INFORMATION POST?

N.I.P. has been gathering information for 5 years - so there's a lot of useful stuff stacked away in files, boxes and cupboards. Take time to familiarize yourself with what's available.

Main Reference Materials

These can be found in: Verticle & Horizontal Files
Window Sill Shelves
Ready Reference binders & directories (on desk)
Bulletin Boards
Cupboards (application forms, pamphlets etc)

As examples we've chosen 3 areas of inquiries and laid out some of the common resources to which you could refer. During your training sessions we'll all go through some more.

Accommodation Questions

First - Find out what kind of accommodation they're looking for. Do they want a hostel? Nursing Home? 5 bedrooms? Is it an emergency? What area of the city do they want to live in?

Then - Look under the file marked "Housing"

If they're looking for a room or apartment:

You can refer them to the "Room Registries" listed in the Housing File.
Also newspapers - and on Bulletin Boards in the community eg. Loblaws Store on Broadview or signs on the windows of houses they'll see if they walk around the area.

O.H.C. and CITY HOUSING

O.H.C application forms are in the cupboard. You must phone for city housing application forms to be delivered. There's a long waiting list (approx. a year). Eligibility based on a point system of need. In cases of extreme need - politicians may be approached to advocate on behalf of clients.

CO-OP HOUSING

- Tenant management
- Cheaper than regular rental
- Must fill out application forms for each co-op

Usually less waiting time than OHC and City Housing

SENIOR CITIZEN HOUSING AND HOMES FOR THE AGED

- see Housing:Seniors & booklet of Homes for the Aged on the window sill and the Blue Book
- some possible referrals would be:
  Metro Senior Apartments - apply at City Hall
  Prevent-A-Care - city owned or subsidized private

and group homes - phone number, name, age etc & they'll send out a social worker in 2 weeks - 1 or 2 weeks for placement

- Second Mile Club - help in finding accommodation in private homes for seniors.

PROBLEMS WITH ACCOMMODATION

(Landlord & Tenant) Referred to: Tenant Hot Line - will advocate on behalf of people if necessary

(O.H.C.) Referred to: Community Guardians - security persons for OHC buildings
Community Service Workers for OHC
Neighbourhood Legal Services - for OHC problems.

Day Care Questions

FIRST Ask some questions;

1. Age of child - this is important because many daycare centres do not accept children under 6 months of age.
2. What area they would like the school to be in?
3. Does the child have some special condition? - Disabled etc.
4. What type of Day Care? Full daycare 7:30 am - 6:00 pm
   Full day nursery 9-12 & 1-3
   ½ day nursery - mornings or afternoons
5. Are they willing to participate in a parent co-operative?
6. Are both parents working? If not they may be eligible for subsidy ie: the government pays the majority of the fee. Apply at Child Care Unit of Social Services Dept. 345 George St. If subsidy has been obtained - check with schools to see if they accept subsidies (accepted by all metro daycare centres, some privately owned ones and labs.

THEN Look in Daycare Handbook on desk and file under Daycare.

FOR Family daycare done in someone's home - Call Family Daycare Services & the list of names that we have on file.

Legal Questions

FIRST Find out what kind of problem they have -

If it's just a simple question that they want answered over the phone they can call Lawline or CLASP.

Legal Counselling by student lawyers - refer them to the nearest clinic - see list on desk - our clinic is Tuesday nights 7 - 9 pm
Student lawyers can give advice, draw up wills, handle cases which other lawyers may consider too trivial, eg: stolen dog etc.

Legal Aid: If the case definitely requires a lawyer for action ie: for divorce proceedings in court - Refer to Legal Aid Office on Richmond St for Legal aid certificate.

Lawyer Referral Service - has list of lawyers who will accept legal aid certificates.

There are also some friends of NIP's - lawyers who will handle a case for free.

Neighbourhood Legal Services on Seaton St will handle U.I.C., Welfare, and O.H.C. problems

Other kinds of questions may involve the Human Rights Commission Licensing Commission, Consumer Protection Bureau Etc.

Records, Statistics and All That Stuff

No call is complete until it has been recorded on the Tally Sheet and in the Log Book.
Why in the midst of chaos and crisis is it necessary to stop and do all this paper work?
Take a look at a sample Tally Sheet and ask yourself the following questions:
Why do we have to know - What area the caller lives in?
What kind of calls we get?
Whether they phoned or dropped in?
Who called?

Some of our reasons are as follows - Can you think of more?

1. Give others (eg funding bodies) a picture of what exactly we do, how we do it, and who we do it for.
2. Identify gaps in services in the area - eg lots of calls for help with U.I.C. forms from Italian speaking people might indicate the need for an Italian speaking worker in the U.I.C. offices - we sould then approach the appropriate people to organize such a service.
3. Planning - Do we need to publicize more in a given area?
   - Do we need to expand our space because so many people are dropping in rather than telephoning us?

Tally Sheets

Every call must be recorded on the Tally Sheet.

Inquiry Area - If you know where the caller is calling form, look on the map on the wall where Ward 7 is divided into 11 areas - find the right spot and check off the appropriate area on the Tally Sheet.

Inquirer
Who called? - a social worker? A resident? - Check appropriate category.

Nature of Inquiry

1. Accommodation
Any questions regarding Permanent or Temporary shelter. "Where do I find a room? A home for the aged? A hostel?

Does not include - tenant-landlord problems or recreational accommodation, as in camps.

2. Community Organizations
Enquiries regarding organizations ie: What they do, who works there, what is the telephone number.

3. Consumer Problems
Anything related to consumerism -eg. Looking for a store that sells rubber ducks - Investigating the legitimacy of a group selling lottery tickets for charity. Dealing with a retail store that refused to honour its guarantees etc.

4. Daycare
Looking for a babysitter or daycare centre for children.

5. Education
Includes formal and informal education - retraining courses, night courses, correspondence courses.
Does not include - recreational courses eg pottery, self-defense etc, or English as a second language.

6. Employment
Looking for a job - or for someone to hire or job related problems eg: workman's comp. or unions
Does not include - looking for babysitters or volunteers

7. Family & Personal
Looking for counselling or advice for family or personal adjustment, eg: needing someone to talk to as in a Listening Post. Parent worried about child taking drugs, or a husband and wife fight.

8. Free Stuff
Need food, clothing, furniture, etc, and can't afford to pay.
Does not include - requests for someone to clean house for free, transportation, etc. (this is a home help or volunteers type of question)

9. Gov't Service
a) Financial Benefits - info. or help with gov't financial programs for individuals
b) Other gov't info., eg. names of elected officials, funding bodies for organizations etc.

10. <u>Health</u>
Information in regards to health problems and facilities, such as drugs, alcohol and mental health programs which require medical attention.

11. <u>Legal</u>
Legal problems. It doesn't generally include tenant problems, consumer problems and financial problems unless referred to a lawyer.

12. <u>Migrants and Immigrants</u>
Requests for services relating to problems unique to immigrants and native people. It also includes English as a second language.

13. <u>Recreation</u>
All inquiries for specific types of recreational and cultural activities. eg: Where can I play bingo, find a day camp or join a club.

14. <u>Elderly and Disabled</u>
Inquiry in regards to any problem unique to the elderly or disabled.

15. <u>Tenant-Landlord Problems</u>
Disputes between a Landlord and Tenant - whether private or public housing is involved.
<u>Doesn't Include</u> - requests for accommodation.

16. <u>Transportation</u>
Any requests for or about transporation - free or public transportation. Requests for special types ie. Wheelchair and moving companies.

17. <u>Home help and Friendly Visiting</u>
Requests for help in having cleaning , repairs, shopping, errands or a friendly visiting.

18. <u>Volunteers</u>
People looking for volunteer work and groups looking for volunteers.
<u>Doesn't Include</u> - requests for home help or transportation.

19. <u>Other</u>
Anything that doesn't fall into any of the above categories. These must be logged.

<u>Drop In - Telephone</u>
Did the inquirer phone us or come and visit? Check appropriate box.

<u>Service Provided</u>
This section is used to keep track of what we do, how we did it and who we did it for.

Logging

This is done on the blue sheets which are then recorded in the green Log Book. We log a case anytime we:

1) know the name of the person we provided the service for
2) when we had to call around to find the information because it wasn't on the files
3) if it seems to be something someone may want to refer to in the future.

Quick Action

For cases that don't need to be logged eg: What is the phone number of the C.N.H. - Does Birthright give abortion referrals - What senior citizen clubs are operating in the area.

Detailed Information

For cases which must be logged, check appropriate action and record log number on the white and the blue sheet.

We record each Inquirer once only. However one person may have several questions or else, if he has only one question it may require several actions on our part.

SAMPLE: A women's purse was stolen when she arrived in Toronto from out of town. She needed accommodation, forms filled out for a new social insurance number, and emergency welfare. She was quite distressed and eventually referred to a counsellor for help.

This case would be labeled as follows:
Inquiry Area - 12
Inquirer - Self
Nature of Inquiry - Accommodation
Family and Personal
Welfare
Service Provided - Completed form
Referred to agency

N.I.P. - The Card Files

A) Alphabetic File

Name - Use name found in telephone bk. or CIC Handbook or other reputable directory (1)

Address (2) Phone (3)

Services Provided (4)

Fee (5)
Contact (6)
Cross Reference (7)

Sub-heading:
See

(1) If a shorter or more common name is frequently used a blank card, under that name, may be inserted in the file referring user to the proper name:
eg: Springboard - see Operation Springboard

(2) If possible, include full mailing address, street no., room or office suite no. and postal code. N.I.P. files often serve to assist N.I.P. and other groups in compiling mailing lists.

(3) If more than one phone number, be sure to include this and to indicate clearly whether the numbers are to be used at specific times, or for specific services.

eg; 924-2543 or 924-2544 (both equal)
921-8340 — Different Times
921-6800 (after hours emergencies)
923-5700 (general information)
921-6301 (specific service) — Different Services

(4) Services Provided:
- This should be brief and concise
- For many services the wording of an established directory such as the CIC Handbook may be followed almost word for word.
- Please do not be specific when quoting hours or particular programmes for such agencies as recreation, community centres, church clubs, etc. It is far better to suggest the type of programming or services provided, and refer a caller to the agency for specific times or last minute changes. If current programme information is not available in brochures in filing cabinet.
- Some where be sure operating hours are included on card There is nothing more damaging to N.I.P. than to refer someone with an urgent problem at 5:15 to an agency which closed at 4:30.

(5) Fee: If possible be specific - eg: No fee
Fee on a sliding scale according to the ability to pay.
May range in general between 25¢ - $2.00.

(6) Contact: This should be the name of a person on staff to whom we can specifically refer clients or who has been particularly helpful to N.I.P.'s staff in answering queries.
The president, chairman, etc. of an organization to whom correspondence, publicity, etc., should be addressed.

(7) Cross Reference: Any related agency or service which is described separately should be indicated here, eg: on card for Don Vale Comm.Centre, Ward Seven News should be listed as cross-ref. Dundas Day-Centre as a cross ref. on Central Neighbourhood House card.

(8) Sub-heading:
Here should be lised all the subject headings under which this organization will be found in the subject file. These headings must be chosen from the list of headings already established by N.I.P. and listed in the file index. If one heading is changed, eliminated or in any way differs from that in the alpha card, all cards in the set must be similarly changed.

(9) See:
This section will indicate further sources of information eg. a pamphlet located in the filing cabinet (for current brochure see file).
A booklet or brochure on the book rack or quick reference shelf (see CIC handbook, p. __ for more detail, and pamphlets on window ledge) etc. This may also include references to subsidiary or related alpha or subject cards, eg. Ward Seven News, Dundas Day Centre, etc.

B) Subject File

(1) Subheading-
This is typed in red and indicated where the card will be found in the subject file. Subheadings must correspond with headings in N.I.P.'s approved list of headings, and must be listed on the main or alpha card.

(2-6) This information should correspond exactly to the main alpha card.

(7) Cross Reference:
Here should be listed the other subject headings under which this organizatin is listed. Again when making any changes to any card set, all cards must be similarly changed at that time.

(8) Same as alpha cards.

C) Sample Card Set

(1) Simple agency/org.
(2) Community Centre, recreation assoc.
(3) Complex linking cards/services (eg. S.A.)

D) Filing Cards

(a) Alpha File
- File cards alphabetically word by word
(sample - Addiction Research Foundation, A.R.F. Detox. Unit; Tor. Branch A.R.F. Toronto.)
- file abbreviations, such as St., Metro, etc as if spelled in full.
(Sample St. Paul's School
St. Simon's Church
Salvation Army)
- file common acronyms, whether being used as reference cards only or as main entries alpha before

word entries.
eg. S.O.C.C.A.
St Bartholomews Church
South of Carlton Site Office
- file numbers as though spelled in full
eg; 4 you (ie; four you)

(b) Subject File:
- Check file index if uncertain how to file a sub-heading card.

E) Updating Information

(a) As new information is received, this should be checked with the co-ordinator as to whether it should be included on cards and how to do so. New information should be typed as soon as possible on all cards in the set.

(b) Regular Checks:
From time to time, all cards in the file must be examined to determine:
(a) if information is still valid
(b) if organization still exists
(c) if all cards in set are still in file
etc.

- This may be done in a number of ways.
1) check the CIC handbook and update sheets as they are produced. Make a note of any obvious changes on all cards.
2) take a section of cards (eg. A section in alpha file), and call each organization listed in turn, asking them to verify whether our information is complete and correct. Make any necessary changes on all cards.
3) Check with any organization having seasonal or varied services or programmes at least four times a year (sept., Dec., March, and June) to remind them to send their brochures to NIP. This should automatically include all organizations listed under the following headings:
Community Centres
Recreation Associations etc.

4) When contacting any organization, for whatever purpose, ask for copies of their brochures etc to be sent to NIP. See that NIP is included on as many regular mailing lists as possible.

6) Read and check off mail, newspapers etc. daily scanning for new information. If necessary call and check about any service or organization which you "discover" here. Check with co-ordinator or make out a rough card for her to see and approve before including it in the files.

7) Be sure and indicate date of any new information

updated card in the bottom right hand corner of <u>all</u> cards. This way we can be fairly sure of giving out accurate information to clients - ie. if client asks in Jan. '76 for a specific program which has not been changed since Jan.'75.

It would be wise to either tell the client that as of Jan.'75 ______________ or, better, yet, to say that you will check to make certain this information still holds.

Information Updating

Keeping information up to date is a never-ending task.
In order to keep in touch with what's going on, we regularly:

- read through newspapers and periodicals and clip appropriate information
- attend community meetings
- pay close attention to "grapevines"
- regularly call organizations & check up on what's happening

Questions to ask when verifying or revising information:

All of the following questions could be asked, even if some of them seem inappropriate at times, so as to ensure that we obtain as much of the information as is possible. Explain that all of the questions are asked to ensure that nothing is missed.
1) Name of the agency, organization or group
2) Exact address, and where that is in relation to major roads.
3) Any other telephone numbers, for example, ones that should be used by people who are calling about specific things.
4) Service, or services provided.
5) Cost of charges if any.
6) Hours during which those services are available, and which days of the week.
7) Any general requirements people must meet to be eligible for the service, or restrictions re the availability of the service.
8) Any other services that the agency offers. (If anything we should have listed in our files, then get all the details.)
9) Any provision for after-hours service.
10) Any provisions for emergency service.
11) Any provision for people who speak languages other than English. If so, then for what languages.
12) Are there any printed materials, pamphlets, or such, that could be sent to us for free?
13) Is there a mailing list which we could be added on to?

Then Thank Them For Their Time And Help!

DECEMBER 1, 1974

LINK 223-9727 call anytime

DEAR ______________________________

Self evaluation is based on the assumption that people want to learn about themselves and about their performance in particular roles.

Services also need to be evaluated from time to time. Usually the most significant comments and suggestions regarding a service, its future growth and development come from those who are involved with it.

Throughout the 3½ years that LINK has been operating, many of us have seen a variety of changes. The growth of the information files, the increase in calls, (especially the nature of some of the calls) the changing structure of LINK, all have made, to a greater or lesser extent, strong demands on us.

I feel we have responded to these demands admirably, sometimes without guidance or back-up. However, I think the time has arrived where we should review what we have learned, take stock, and possibly form some strategy for future planning for additional skills.

At this time, we are asking each of you to take a few minutes of your busy schedule to get in touch with yourselves and help us in evaluating the service LINK offers. As the evaluation may be repeated, it is hoped you will have a chance to think about your own strengths and satisfactions, as well as set the goals you yourself wish to accomplish in the next year. Your program ideas, views and any other suggestions regarding LINK will be greatly appreciated.

You will notice that the questionaire is in two parts. Please return Part I as this will give us some ideas as to what you would like to see in the future, and it will also help us in training new volunteers. You can return this by bringing it with you to the office when you come in.

Part II of the questionaire is mainly for your private use. However, I would like some feedback on it so I wondered if it would be feasible for you to return it by stamped, self-addressed envelope enclosed. You do not have to sign your name to it if you don't wish to do so. If you would like to discuss your feeling on it, please sign your name and we could get together to talk about it. By returning Part II, you are really giving us your reaction on various levels. This will really point up strengths (where our training has been useful) and our weaknesses (where more training is needed in specific areas). Needless to say, Part II will be strictly confidential.

Yours truly,

SELF-EVALUATION PART I

All replies are confidential. Please complete by answering the questions or expanding or completing the sentences offered. Should further space be required, please use the reverse side of the paper or attach additional sheets of paper.

1. How long have you been with LINK?

2. Type of volunteering with LINK? (i.e. weekly, once every two weeks, committee member, interviewer, clerical, etc.)

3. I first became aware of LINK ......

4. Concerning the training sessions that I received when I began, I feel.......

5. The things that would make me feel more self-confident as a LINK volunteer are ....

6. The things that I most enjoy about being a LINK volunteer are ....

7. The things I do not like about being a LINK volunteer are ....

8.. The kinds of training sessions or education programs I would like to see LINK have in the next year are ....

9. Availability for monthly training sessions?

10. Additional responsibilities I would be willing to take on for LINK are ....

11. I expect to remain involved with LINK ....

12. Questionaires such as this ....

SIGNATURE

SELF-EVALUATION PART II

How would you rate yourself in the following areas?
LOW 1 2 3 4 5 HIGH

I WORK MANAGEMENT

a.	attendance for assigned shifts	1	2	3	4	5
b.	punctuality	1	2	3	4	5
c.	completion of work sheets	1	2	3	4	5
d.	quality of writing or record keeping	1	2	3	4	5
e.	sharing of new information	1	2	3	4	5
f.	relationship with other volunteers	1	2	3	4	5
g.	resourcefulness in locating information	1	2	3	4	5

II ATTITUDES TOWARDS PATRONS

a.	ability to listen and empathize	1	2	3	4	5
b.	quality of patience and acceptance	1	2	3	4	5
c.	ability to give encouragement & support	1	2	3	4	5
d.	ability to remain non-judgemental	1	2	3	4	5
e.	purposefulness in contact with patron	1	2	3	4	5
f.	calmness in dealing with crisis	1	2	3	4	5

III DIRECT WORK WITH PATRONS

a.	ability to engage patron's participation	1	2	3	4	5
b.	ability to obtain facts from client	1	2	3	4	5
c.	ability to handle patron s feelings	1	2	3	4	5
d.	encourage patron to work towards solution	1	2	3	4	5
e.	ability to give focus to the contact	1	2	3	4	5
f.	ability to terminate the contact	1	2	3	4	5

IV LEARNING

a.	understanding of the role of LINK	1	2	3	4	5
b.	understanding network of community services	1	2	3	4	5
c.	openess to learning	1	2	3	4	5
d.	initiative to make learning needs known	1	2	3	4	5
e.	dependency on supervision	1	2	3	4	5
f.	pace of learning	1	2	3	4	5
g.	ability to take on additional responsibility	1	2	3	4	5

SUPERVISION: In this section please comment on your feelings about constructive criticism, and how you would feel about reviewing your record sheets with the supervisor as a learning experience?

June, 1978

Community Awareness

A series of competency based learning activities for Field Workers

Ontario

Ministry of Community and Social Services

Training and Staff Development Branch

FOREWORD

This work book was designed for use in on-the-job training for field workers in the Ministry of Community and Social Services. Its aim is to suggest a variety of methods of acquiring the skills of identifying community resources, developing working relationships with community resources, advising the client of them, identifying community needs, and acting on community needs.

The series of progressive learning activities to expand the worker's community awareness were prepared by Bernard Gelfand, Consultant to the Ministry's Training and Staff Development Branch, as a useful tool for decentralized learning in the district offices. Some of the activities are intended for use by the field worker and supervisor together, others by the new field worker alone, and, still others, by a group of field workers where this is feasible.

In 1975, the Training and Staff Development Branch initiated an analysis of the tasks performed by field workers and major task areas, termed competencies, were identified. The skills within each competency band were subsequently classified by letter and number for ease of reference to the competency chart devised by the Branch. Community Awareness is one such competency band. Hence all learning activities in this work book refer to competency band "H".

Training and Staff
Development Branch

Ministry of Community and Social Services

CONTENTS

COMPETENCY: COMMUNITY AWARENESS H1

SKILL: Identify community resources*.

PURPOSE: To prepare worker for providing accurate community resource information to clients and other helping service personnel.

BEHAVIOURS:

1) acquire knowledge of community resources;

2) identify community resources;

3) to be able to recognize appropriate community resource information required by clients, and

4) to be able to recognize when appropriate community resource information is lacking for provision to clients.

* Community resources are defined as goods and services which have been established to promote, maintain and protect social functioning of individuals, families, and groups.

CELL H1 - LEARNING ACTIVITY 1

The purpose of this activity is to help the field worker acquire knowledge of community resources.

How does the worker get knowledge of community resources? In order to develop the skill of becoming knowledgeable about community resources, the field worker must learn to use the resources in the work environment that provide the information sought. Worker and agency initiative are used to seek out persons and materials that possess such knowledge.

Step #1 - A group of workers is convened.

Step #2 - The Workers are introduced to figure 1 on page 4 (Worker and Agency Initiatives for Developing Knowledge of Community Resources Through Persons and Materials). Each of the four cells represents a combination of the source of initiative and the resource available for acquiring knowledge of community resources. As exemplified in figure 2 on page 5 , Cell 1 lists 14 different resources when the field worker initiates contact with various persons in the work environment. Cell 2 notes 6 material resources when the worker initiates contact with these materials. Cell 3 is a list of 7 person resources that can be used when the agency is the source of initiative for learning. Finally, Cell 4 lists 4 materials that might be provided by agency initiation. Not all of these sources of knowledge of community resources are of equal significance in promoting the workers' knowledge in this area.

Step #3 - Explain figure 1 to your group. Answer all questions before continuing with step #4.

Step #4 - Lead the worker group in a brainstorming session in order to fill in the empty cells in figure 1. See page 5 , Figure 2 for example of one brainstorming session.

H1 - LEARNING ACTIVITY 1

FIGURE 1 - WORKER and Agency Initiatives for Developing Knowledge of Community Resources through Persons and Materials

SOURCE / RESOURCE	PERSONS	MATERIALS
WORKER INITIATIVES		
AGENCY INITIATIVES		

FIGURE 2 - WORKER and AGENCY Initiatives for Developing Knowledge of Community Resources Through Persons and Materials

SOURCE	RESOURCE: PERSONS	RESOURCE: MATERIALS
WORKER INITIATIVE	1. Consult Community Information Services Initiate Field Trips to Agencies Initiate Case Conferences with Comm. Agencies Initiate Supervisory Session Initiate Involvement with Client Groups Participate as Volunteer in New Comm. Services Affiliate with Established Agency, e.g., as board member Work on Social Planning Body Affiliate with Community Associations, e.g., Lions, Kiwanis, etc. Listen to Clients Make contact with Comm. Agencies through work Locate Underground or Counterculture Agencies Develop rapport with Comm. Agencies Participate in Staff Training Listen to Peers	2. Read existing Comm. Resource Directories Update existing Comm. Resource Directories Read books about Soc. Services Read publications sent out by various agencies, e.g. C.A.S. Be attuned to local media Keep notes on Comm. Resources Collect and read other Directories from other ministries
AGENCY INITIATIVE	3. Locate Ministry Resources Survey Client Needs Attend inter-agency staff conferences Attend supervisory sessions - individual Attend supervisory sessions - group Attend inter-agency staff conferences Attend field trips to agencies	4. Read In-House Newsletter Read Administrative Manual Use Resource Library Use Audio-Visual material Conspectus

CELL H1 - LEARNING ACTIVITY 2

The purpose of this learning activity is to introduce to the worker those ways of acquiring knowledge about community resources most commonly used.

Step #1 - Suggest the following sources of community resource knowledge to those workers that need them:

a) read and become familiar with existing community resource directories;

b) make contact with appropriate social agencies as demanded by field work;

c) consult the local community information services;

d) consult peers on an informal basis regarding community resources;

e) listen to clients about their knowledge of community resources, and

f) attend individual and group supervisory sessions relating to community resource information

CELL H1 - LEARNING ACTIVITY 3

The purpose of this activity is to involve the worker in the development of knowledge about community resources in the local community.

Your local community may not have an existing community resource directory. Perhaps, if your community does not have such a publication, you may wish to develop one. It can be begun this way:

Step #1 - Convene a group of workers for the purpose of sharing known community resources.

Step #2 - Ask the group members to identify, verbally, all community resources known to them.

Step #3 - Write the community resources down, function, purposes, telephone no., contact person, address, etc.

Step #4 - Ask other workers not in the group to add to the list of resources, if possible.

Step #5 - Send your list to agencies identified by the workers and yourself. Ask them to add to the list, if possible.

Step #6 - Once a comprehensive list of community resources has been compiled, convene a meeting of agency representatives to determine publication resources, e.g., finances. Include interested workers in this process.

Step #7 - Publish and distribute the directory to all community service agencies and other interested parties; and

Step #8 - Update directory periodically by convening workers. Their knowledge of the development of new services can be added to the directory.

Monitoring the Acquisition of Community Resource Knowledge

Below are a number of suggestions for monitoring the field workers' acquisition of community resource information.

1. Ask workers to mark off those activities they have been involved in (Figure 1) during the previous three months of work.

2. As supervisor, you may ask the workers to list all community resources known to them.

3. As a modification of the above, you may ask workers on a specified date to list all community resources known to them; then ask them to repeat this procedure three months after this date.

4. As well as listing community resources you may ask workers to list the resources' function, i.e., services offered; and

5. One impressionistic way of monitoring your workers' knowledge of community resources is to recognize the use they make of them in supervisory discussions.

H1 - LEARNING ACTIVITY 4

The purpose of this activity is to help the worker match community resources with the services they offer.

Step #1 - Ask workers to list all the community resources they know, or can remember.

Step #2 - Ask them to write, beside these resources, all the services each resource provides. See Figure 3 below for an example. For variation, this process may be reversed.

FIGURE 3

	COMMUNITY RESOURCES *	SERVICES
1	FAMILY SERVICE AGENCY	MARRIAGE COUNSELLING, PARENT-CHILD COUNSELLING BUDGET COUNSELLING
2	BIG BROTHERS	PROVIDES MALE RELATIONSHIP FOR BOYS BETWEEN AGES OF ___ AND ___ WHOSE FATHERS ARE ABSENT
3	ALCOHOLICS ANONYMOUS	INDIVIDUAL AND GROUP SUPPORT TO PROBLEM DRINKERS

* EITHER SIDE MAY BE LISTED FIRST

Step #3 - Check the workers' answers with available directories specifying services.

H1 - LEARNING ACTIVITY 4

Instructions:
In the left hand column below, write down all community resources known to you. In the column at the right, identify all services these resources deliver.

COMMUNITY RESOURCE	SERVICES
1.	a)
	b)
	c)
2.	a)
	b)
	c)
3.	a)
	b)
	c)
4.	a)
	b)
	c)
5.	a)
	b)
	c)
6.	a)
	b)
	c)

H1 - LEARNING ACTIVITY 5

The purpose of the following activity is to elaborate on the previous exercise (learning activity 4) by asking the worker to identify a contact person within the named community resource.

Step #1 - Ask workers to identify a contact person for each community resource they have listed. For example:

FIGURE 4

COMMUNITY RESOURCE	SERVICE/S	CONTACT PERSON
FAMILY SERVICE AGENCY	MARRIAGE COUNSELLING	INTAKE WORKER MARY ASLING TELE: 361-5542

H1 - LEARNING ACTIVITY 6

The major purpose of the activity that follows is to give workers practise in identifying community resources that meet client need.

Step #1 - Ask workers to read the case histories on page 13, and determine from the history those community resource/s most appropriate for meeting the client's need.

Step #2 - Discuss with workers their answers to determine appropriateness and relevance to case in question. Develop other case histories of your own for further worker practise.

H1 - LEARNING ACTIVITY 6

Instructions:
Read the case histories below, and determine what community resources can be applied to the alleviation of the client's need/s.

Case History - Robert Charney, Age 48.

Robert Charney, a married man with three children in high school was employed in the construction trade, and worked steadily during the Spring, Summer and Fall seasons. Prior to 1973, and severe inflation, Mr. Charney was able to put aside enough money to carry his family during the Winter months. As inflation set in and mounting expenses were incurred, Mr. Charney's financial resources were exhausted. Borrowing from friends and picking up odd jobs that came his way did not solve his financial woes. With reluctance he...........................

What community resource/s might help alleviate Mr. Charney's problem?

____

____

____

Case History - The Hawin Family.

Mrs. Hawin and her three children, Robert 11, Tillie 7, and Karen 4, live together in a low income area with few recreational facilities. Mrs. Hawin has been receiving Family Benefits for two years. Her husband has deserted and no-one has been able to trace him since the time of his disappearance. During her last visit to the home, the field worker noticed that Mrs. Hawin seemed quite depressed. More alarming were the condition of the children; the two youngest, Tillie and Karen, appeared very thin and dirty, their clothes tattered. Mrs. Hawin, who previously had cared well for her children, seemed to take no notice of them. The field worker planned another visit to the Hawin household, for the purpose of......................................

What community resources might you call into play to help in this situation?

____

____

____

H1 - LEARNING ACTIVITY 7

The purpose of the following exercise is to encourage worker understanding of basic social service terms.

Step #1 - Ask workers to match the definitions on page 15 with their correct term.

Step #2 - Workers can check their answers with the answer sheet on page 16.

H1 - LEARNING ACTIVITY 7

Instructions:
Match the definitions below with their correct terms. Check your answers on page 16.

DEFINITIONS		TERMS
1. Reduces financial uncertainty, alleviates temporary financial hardship and prevents or reduces poverty for a large number of citizens who may be expected to participate in the labour force.	______	A. INCOME SUPPORT B. DEMOGRANT C. GUARANTEED INCOME D. SOCIAL INSURANCE
2. Aids persons whose right to benefits is determined by their previous contributions or earnings or coverage under the program.	______	E. INCOME PROTECTION F. GROUP WORK G. VOCATIONAL REHABILITATION H. CASEWORK
3. Measures aimed directly at persons, who, for reasons beyond their control cannot enter the labour force.	______	
4. The level of benefit is tied to the income of the beneficiary,	______	
5. Benefits are paid to all those in a certain age category.	______	
6. A variety of methods used to help the disabled obtain meaningful employment.	______	
7. A one-to-one relationship between client and social worker aimed at improving the clients coping and problem-solving skills.	______	
8. Methods used in a group by a social worker to help group members help each other.	______	

H1 - LEARNING ACTIVITY 7

ANSWER SHEET

1. E
2. D
3. A
4. C
5. B
6. G
7. H
8. F

H1 - LEARNING ACTIVITY 8

The major purpose of this activity is to promote worker knowledge of some basic social service terms and the community resources that actualize them.

Step #1 - Ask workers to match the community resources on page 18 with the basic social service terms listed on the right side of the page.

Step #2 - Workers can check their answers with those on the answer sheet on page 19.

Step #3 - Discuss with workers, if appropriate, any terms they do not understand as they relate to concrete social services.

H1 - LEARNING ACTIVITY 8

Instructions:
Match each of the community resources with one of the basic social service terms listed on the right hand side of the page.

COMMUNITY RESOURCES		SOCIAL SERVICE TERMS
1. FAMILY BENEFITS	___	A. VOCATIONAL REHABILITATION
2. SHELTERED WORKSHOP	___	B. CASEWORK
3. CANADA PENSION PLAN	___	C. GROUP WORK
4. FAMILY ALLOWANCES	___	D. INCOME PROTECTION
5. WORKMEN'S COMPENSATION	___	E. DEMOGRANT
6. OLD AGE SUPPLEMENT	___	F. INCOME SUPPORT
7. MUNICIPAL WELFARE	___	G. DEMOGRANT
8. FAMILY SERVICE AGENCY	___	H. SOCIAL INSURANCE

H1 - LEARNING ACTIVITY 8

ANSWER SHEET

1. D
2. A
3. H
4. G
5. H
6. E
7. F
8. B, C

H1 - LEARNING ACTIVITY 9

The purpose of this exercise is to help workers identify the most appropriate community resource for meeting client need.

Step #1 - Ask worker to complete the exercise on page 21.

Step #2 - Workers can check their answers with those supplied on page 22.

Step #3 - If workers wish, discuss with them the reason/s for choosing a community resource to meet client need.

H1 - LEARNING ACTIVITY 9

Instructions:
Circle the most appropriate community resource to meet the client need aroused by the problem situation.

	PROBLEM SITUATION	COMMUNITY RESOURCES
1.	a man's earnings are temporarily interrupted due to seasonal layoff	a) Municipal Welfare b) Vocational Guidance Testing c) Canada Manpower d) Family Benefits
2.	a child in grade 6 is suspected of having a learning disability	a) Psychiatric hospital - outpatient dept. b) Family Service Agency c) Mental Retardation Centre d) Psychological Testing Service
3.	a mother and her fifteen year old daughter constantly fight over curfew and other parental restrictions	a) Juvenile and Family Court b) School Social Worker c) Neighbourhood Recreation Centre d) Family Service Agency
4.	a mother on Family Benefits constantly refers to feelings of overwhelming fatigue	a) Family doctor b) Psychiatric Facility c) Canada Manpower d) Obstetric Clinic - General Hospital
5.	unemployed, a man's unemployment insurance benefits have run out a month ago, and he is without financial resources	a) Canada Manpower b) Salvation Army c) Municipal Welfare c) Workmen's Compensation
6.	a married woman's husband dies, leaving her a penniless widow at age 64	a) Municipal Welfare b) Old Age Security c) Family Benefits d) Guaranteed Income Supplement

ANSWER SHEET

1. c
2. d
3. d
4. a
5. c
6. b, d

H1 - LEARNING ACTIVITY 10

The major purpose of the following activity is to provide workers with a simple, step-by-step guide for searching for required community resources.

Step #1 - Ask workers to read page 24.

Step #2 - Workers may wish to discuss the guide for further understanding.

H1 - LEARNING ACTIVITY 10

Steps in Getting Community Resource Information When it is Lacking.

It is apparent that field workers will be faced with situations where their knowledge of community resources will not be comprehensive. Below is a step-by-step procedure in closing this gap in knowledge;

1) recognize with the client that you do not know the required community resource. This is a realistic action; workers do not need to appear omnipotent;

2) let the client know that you will try to obtain the information he/she requires and that within a specified period of time, you will report back with your findings;

3) search for required information -

   a) in community resource directories
   b) in community information services
   c) by consulting with peers
   c) by consulting with supervisor;

4) contact client at specified time and let the client know what information you have discovered.

Further Suggestions for Monitoring Community Resource Knowledge

Below are a number of suggestions for monitoring the field worker's capacity to identify appropriate community resources.

1) ask the field worker to do exercise #1 periodically, say at three month intervals. Note the difference in number of community resources and services of same known over time. You may set up a criterion for a new field worker - for example, the new worker should be able to name and relate services to 20 community resources at month 1. At month 3, the criterion may be set at 40.

2) the same kind of expectations may be set for the worker regarding exercise #2.

3) a large number of problem situations may be constructed for which appropriate resources must be chosen (activity 9). There are several ways of monitoring whether the field worker can choose appropriate community resources.

    a) all new field workers are asked to complete activity 9, and then to discuss why they made such a choice within a group situation. The Supervisor can gain a strong impression of each worker's capacity to identify appropriate community resources in this way.

    b) through a consensus procedure, utilizing experienced field and supervisory staff, the appropriate community resource for each problem situation is identified. A criterion can be developed for each time period for which testing is required. For example:

Month 1	10 of 20 correct	
Month 3	15 of 20 correct	(new set)
Month 6	18 of 20 correct	(new set)

COMPETENCY: COMMUNITY AWARENESS

SKILL: Develop a Working Relationship with Community Resources.

PURPOSE: For Developing Worker-Community Resource Relationships Which Serve Client Resource Needs.

BEHAVIOURS:

1) identify contact persons in community resource agencies,

2) initiate communication with contact person,

3) give information to community resource contact person regarding agency function,

4) receive information from community resource contact persons regarding their agencies' function.

H2 - LEARNING ACTIVITY 1

The purpose of this activity is to provide workers with suggestions for developing a list of community resource contact persons.

Step #1 - Ask workers to read page 30, and if possible, write down other suggestions they may have for developing a list of community resource contact persons.

Step #2 - If workers wish, discuss the list with them.

H2 - LEARNING ACTIVITY 1

Identifying Community Resource Contact Persons.

The following are some suggestions for developing a list of community resource contact persons. See if you can add your own suggestions to this list.

1. Each time you contact a community resource agency and speak with a representative of that agency, you should write down the representative's name for future reference.

2. Consult with your work peers regarding their knowledge of contact persons in community resource agencies.

3. Consult with community information services regarding their possible knowledge of the required community resource agency and its appropriate contact person.

4. Frequently, contact persons of community resource agencies are invaluable funds of information for identifying other contact persons in other agencies.

5. ______________________________

____

____

6. ______________________________

____

____

7. ______________________________

____

____

H2 - LEARNING ACTIVITY 2

The purpose of this learning activity is to help workers consider the possible goals of meeting with various community resource contact persons within their area of operation.

Step #1 - Ask workers to turn to page 32, and to write down possible goals for an inter-agency meeting of contact persons.

Step #2 - Ask workers to compare their suggestions of goals with those on page 33.

Step #3 - Discuss with workers, if you or they wish, the suggestions generated by this exercise.

H2 - LEARNING ACTIVITY 2

Instructions:
Develop a list of possible goals for the convening of a meeting of various agency contact persons in your area of operation.

Goal 1: ______________________________

____

____

Goal 2: ______________________________

____

____

Goal 3: ______________________________

____

____

Goal 4: ______________________________

____

____

Goal 5: ______________________________

____

____

H2 - LEARNING ACTIVITY 2

GOAL SUGGESTIONS

In essence, developing working relationships with contact persons in community resource agencies, is practising a form of community development. In order to facilitate this process, you may attempt to convene a meeting of community resource agency contact persons within your area of operation. Possible goals of such a meeting might be:

a) to gain an acquaintanceship with those attending the meeting;

b) to identify the specific functions of each agency person attending;

c) to learn the details of making an appropriate referral to the resource agency, and,

d) to consider the possibility of periodic inter-agency meetings for the purpose of effective co-ordination.

Monitoring Acquisitions of Working Relationships
Between Family Benefits Worker and Other Community Agencies.

1. Ask workers to do learning activity 5, H1 on page 11 periodically, in order to determine any increases in contact person knowledge over time.

2. Ask workers to list all community agency contact over, say, a three month period. Repeat this again in another three months. Are different agencies listed upon repetition?

<u>COMPETENCY</u>: COMMUNITY AWARENESS

<u>SKILL</u>: Advise the client of community resources.

<u>PURPOSE</u>: To assist clients in search of the appropriate community resource for fulfilling their social needs.

<u>BEHAVIOURS</u>:

1) <u>identifying</u> client need,

2) <u>recognizing</u> community agencies that provide services to meet client need,

3) <u>providing</u> client's accurate information regarding appropriate community resources.

H3 - LEARNING ACTIVITY 1

The major purpose of the following learning activity is to give workers practise in identifying problems clients are having, and, as well, the social services required to lessen the problem.

Step #1 - Ask workers to read the instructions on page 38 and complete the exercise.

Step #2 - Discuss with workers their choices of community resources, as well as the problems they were able to identify.

Note: As a variation of this learning activity, ask workers to develop their own case histories directly from their own work. Convene a meeting of workers, and help them develop discussion concerning the problems these cases display and the community resources they require.

H3 - LEARNING ACTIVITY 1

Instructions:
On page 39 are several case histories. You are to identify the problem/s that each case history demonstrates, and as well, suggest the required service/s to lessen the problem.

Definitions:

a) problem - a socially agreed upon way of classifying social dysfunctioning, e.g., mental illness, juvenile delinquency, alcoholism, family breakdown, etc.

b) service - a community resource that if effectively provided can lessen the problems, e.g., family counselling or therapy; provision of Big Brother or Sister; budget counselling; recreation; etc.

CASE HISTORY 1

Mrs. Elber, a single parent, aged 43, mother of four children, 2 girls, 13 and 9 years old, and two boys, 16 and 11 years old, told the field worker that she is having trouble getting her oldest children to come in at night at the curfew that she set - 9.00 p.m. John, the eldest boy is out sometimes to 11.00 p.m. and refuses to tell her where he's been. Mrs. Elber notices that he seems to have a lot of money to spend, and when she asks him where he got it he becomes evasive. Ellen, her 13 year old daughter has been hanging around with a group of older teenagers, girls and boys, who drink and skip school whenever they feel like it. Ellen's teacher has repeatedly asked Mrs. Elber to take court action for her daughter's sake. Mrs. Elber feels she has lost complete control of her children and has turned to the worker for suggestions and help for her children.

PROBLEM/S	SERVICE/S REQUIRED

CASE HISTORY 2

Mrs. Smyth, a Family Benefits mother, aged 26, has two children. Her son is eight years old; her daughter is six years old. Mrs. Smyth has told the worker that she has had a "steady" man for almost a year now. The children have asked her whether her man friend is their father; Mrs. Smyth's replies have been evasive. She says the children want a father, "just like everyone else," but she has been unable or unwilling to let her children know what her relationship to this man is. Mrs. Smyth has mentioned often that she would never marry again. Her first marriage lasted only one year, ending when her husband deserted during her pregnancy.

PROBLEM/S	SERVICE/S REQUIRED

H3 - LEARNING ACTIVITY 2

The purpose of the following activity is to provide workers practise in identifying the community resource/s that are appropriate to specific problems.

Step #1 - Ask workers to complete the exercise on page 41.

Step #2 - Discuss with workers their reasons for the choices of community resources they made.

H3 - LEARNING ACTIVITY 2

Instructions:
Choose the most appropriate community resource for the alleviation of the client problem.

PROBLEM	COMMUNITY RESOURCE
1. Client requires dentures.	1. ____________
2. Mother tells worker her child cannot read.	2. ____________
3. Mother wants to learn nutrition.	3. ____________
4. 10 year old is a bedwetter.	4. ____________
5. Family Benefits mother wants part-time work.	5. ____________
6. Mother reports her 16 year old has been "hearing voices".	6. ____________
7. Family Benefits mother says she needs help budgeting.	7. ____________

H3 - LEARNING ACTIVITY 3

The major purpose of this learning activity is to aid workers' skill in problem identification and problem solution.

Step #1 - Ask for volunteers from your worker group to take part in role plays.

Step #2 - Ask one worker to role play a client who has a problem, another to role play a worker. The "client" describes the problem in vague terms; the "worker" helps to clarify the client's problem and to suggest possible community resources for its solution.

Step #3 - Group discussion should follow the role play. Questions: how well did the worker clarify the client's problem? Are there other possible sources of help that the worker might have suggested?

H3 - LEARNING ACTIVITY 4

The major purpose of this activity is to provide workers with guidelines when informing clients of community resources.

Step #1 - Ask workers to read the guidelines on page 44.

Step #2 - Ask workers to list other guidelines they consider important.

H3 - LEARNING ACTIVITY 4

Guidelines for Describing Community Resources.

1. State the Name of the Agency in full.

2. Describe how the agency works and its functions. The description should include what kind of help will be given; who will give it; what the client's responsibilities will be; how long the help will likely last; will there by any charge for the service and how this will be paid; how to contact the agency if service is desired (the process of doing so).

3. State the person's name at the agency who is the contact person. Write it down for the client if necessary.

4. State the address and telephone number of the agency, and if necessary, write this down for the client.

Monitoring the Accuracy of Worker Community Resource Information.

1. Construct a number of case histories that include a definite problem situation. Get agreement on the kind of problem that it is and also the functions that might help solve it. Present the cases to the field workers and ask them to complete the exercise. A standard can be set up for the beginning field worker. For example, the beginning worker should get 5 of 10 problem identifications correct, as well as recognize 8 of 16 functions that might solve the problem. The standard demands progressively more accuracy on each test period.

2. The supervisor can get a good impressionistic estimate of workers' skills from the group analysis part of H3 - Learning Activity 1 on page 38 and the role play exercise, H3 - Learning Activity 3 on page 42. Workers may rate each other after the completion of each activity if so wished.

3. The supervisor can rate how well the field worker is able to recognize community resources that match problem description as in H3 - Learning Activity 2 on page 40.

H3 - LEARNING ACTIVITY 5

The purpose of this learning activity is to help workers practice client referrals by telephone.

Step #1 - Convene a small (4-6) group of field workers for role play.

Step #2 - One worker takes the role of the community resource contact person, another takes the role of the referring worker. Potentially real situations can be used, i.e., where the worker in the near future must make a telephone referral to a community resource.

Step #3 - Ask observing workers to rate the referring worker on the criteria listed below.

Criteria for Role Play Observers

Is the referral:

a) clear in its request for service?

b) clear in its exploration of what the client problem is?

c) expressive of the worker's opinions and feelings of the client problem? (remember, the telephone cuts off non-verbal cues, and makes verbal behaviour paramount)

d) clear as to the field worker's future role in the case?

e) definitive of what the client's next action is to be?

H3 - LEARNING ACTIVITY 6

The purpose of this activity is to help field workers accurately communicate by written message to community resources.

Step #1 - Ask workers to read the request for service and referral letter on page 48.

Step #2 - Ask workers to answer questions and to state their major criticisms of the letter on page 48.

Step #3 - Ask workers to consult the answers to the questions on page 49. Discuss with them any issues that have arisen by the Breckenridge letter.

Step #4 - Ask workers to read the Gordon referral letter on page 51.

Step #5 - Workers should then answer the questions regarding both letters that appear on page 52.

Step #6 - If desired, discuss the topic of written communication to community resources with workers.

Instructions:
Read the referral letter below; turn to page 49 and answer questions regarding its correctness.

Ms. Ethel G. Smith,
Intake Worker,
Galesford Family Counselling Agency,
17 North Street,
GALESFORD. ONT.

Dear Mrs. Smith,

RE: LILA BRECKENRIDGE,
TOMMY, HAROLD

Lila Breckenridge is having problems with her children, Tommy and Harold, and wants to do something about it. You thought your agency would be able to help them. I've told Mrs. Breckenridge that an appointment has been set up for her, and she is quite willing to come to see you as we agreed.

Please contact me if I can be of further assistance.

Very truly yours,

Mary Carson,
Field Worker,
Family Benefits.

	CIRCLE ONE
1. Should the letter state the ages of the Breckenridge family?	YES NO
2. Does the letter clearly state the problem Mrs. Breckenridge is having with her children?	YES NO
3. Should the letter note the date of phone conversation between field worker and contact person?	YES NO
4. Does the letter state the kind of help the Galesford Family Counselling Agency thought they could give?	YES NO
5. Should the letter state the date Mrs. Breckenridge will keep an appointment with the agency contact person?	YES NO

What are your major criticisms of this referral letter?

H3 - LEARNING ACTIVITY 6

ANSWER SHEET

1. YES

2. YES

3. YES

4. NO

5. YES

H3 - LEARNING ACTIVITY 6

Instructions:
Read the following letter; answer the questions on page 52.

Mr. Ronald Jones,
Supervisor, Applications,
Ontario Housing Corp.,
663 West 14th Street,
LOCKLEY. ONT.

Dear Mr. Jones,

RE: GORDON FAMILY
Mother: Celia, age 34
Children: Karen, age 16,
Barry, age 12,
Terry, age 4.

This letter comes as a supplement and a confirmation of our telephone conversation on June 18th, 1975, regarding the Gordon Family.

As you will recall, the Gordon family is presently living in substandard housing at 43 Bartlett Street. They live in two rooms, one of which requires mother and Karen to sleep together, and the other services as a bedroom for Barry and Terry. The family has no access to privacy nor do they have room to keep food other than in their refrigerator and out in the open in a room that serves as both bedroom and kitchen. Although these conditions make cleanliness and good housekeeping standards difficult, Mrs. Gordon has maintained the two rooms in good order. She cares about the way her family is living.

I have talked with Mrs. Gordon about applying for low-income housing and she is in agreement with making such application. She is aware of the time set for her appointment with you as July 17th, 1975, at 3.00 p.m. at your office.

I will be contacting you in the near future to hear of further developments in Mrs. Gordon's application.

Very truly yours,

Arthur Dean,
Field Worker,
Family Benefits.

What are your major criticisms of the referral letter?

Note similarities and differences between the Breckenridge and Gordon letters.

What is absent from both letters that you would wish to include?

H3 - LEARNING ACTIVITY 7

The major purpose of the following activity is to provide workers with guidelines for writing case summaries to community resources.

Step #1 - Ask workers to read the guidelines on page 54.

Step #2 - Discuss with workers these guidelines and any other issues raised by the topic of written case summaries.

H3 - LEARNING ACTIVITY 7

Instructions:
Below are a number of guidelines that can provide help when writing case summaries of client contacts to other community resources.

The summary should:

1) summarize the field worker's contacts with the client, and include the period of time the client has been known to the worker;

2) clearly specify the known problems of the client, as they relate to the purpose of the referral.

3) summarize the client's strengths and positive qualities (few reports consider these);

4) state how the client has coped with the difficulty that has lead to referral to the present time;

5) state the field worker's opinion as to why the referral and subsequent service to the client would lead to positive client benefits;

6) ask the community resource agency for follow-up information within a specified period of time;

7) make the community resource contact person aware of the field worker's availability for consultation.

H3 - LEARNING ACTIVITY 8

The major purpose of the following learning activity is to help workers gain practise in the preparation of clients for referral visits to community resources.

Step #1 - Convene a small group of workers (6-8) in order to design a role play.

Step #2 - One worker is designated "the worker", another "the client".

Step #3 - A situation is created; for example, the worker is a Family Benefits worker referring an F.B.A. mother of 37 years of age to O.H.C. for low income housing. Other role plays can be designed from anticipated referral situations. Workers in the role play should help clients prepare for their referral visit to the community resource in question.

Step #4 - Lead the group of workers in an analysis of "the worker's" effectiveness in preparing the client for referral.

H3 - LEARNING ACTIVITY 9

The purpose of this exercise is to provide workers with a summary of steps in community resource referral.

Step #1 - Ask workers to read the summary of referral steps on page 57.

Step #2 - Discuss with workers any issues raised by the summary.

H3 - LEARNING ACTIVITY 9

Summary of Steps in Community Resource Referral

Instructions:
Read the following steps; discuss with your supervisor any issues raised by the material.

1. Identify with client the problem and its dimensions.

2. Suggest to the client the possibilities of referral to a community resource agency for help with the problem. Let the client know why and how you think the service will help.

3. Contact the agency to which you wish to make the referral. Discuss with them the important aspects of the client's problem. The agency may ask you for a written letter of report stating the client's problem and other pertinent material about the client's family. Make sure your written material is to the point, clear, and readable.

4. When the referral is accepted, get an appointment time from the agency and give this information to your client (often the agency will wish to contact your client by phone or letter).

5. Make sure your client knows the time of his appointment, where the agency is located, and who is to see the client upon arrival.

6. More times than we realize, clients fail to keep their referral appointments out of fear or shyness. If you have surmised that your client may be unable to keep the appointment because of such anxiety, offer to accompany them to the agency. Your support may be all that's needed to help them keep their appointment; and

7. Request information from the agency periodically about your client. This may be received by phone or written material.

Monitoring the Skill of Advising Clients of Community Resources.

1. Develop 5-point rating scales to measure the field worker's capacity to refer by telephone. See telephone role play exercise on page 46, for criteria.

   For example;

   <u>Clear in request for service</u>:

5	4	3	2	1
EXTREMELY CLEAR	VERY CLEAR	CLEAR	UNCLEAR	NO CLARITY

   The five criteria could be rated and a number of points, say 15, (5 x the midpoint on each scale) could be used as the standard for adequate performance on this exercise.

2. A checklist can be developed for monitoring the field worker's ability to write adequate referral letters. For example:

   a) includes all relevant biographical data ________________
   b) problem of client stated clearly ________________
   c) states the help needed by client ________________
   d) notes the awareness of client of referral ________________
   e) states the problems client may have in presenting him/herself to agency ________________

3. A checklist may also be constructed to monitor the field worker's ability to write good reports. See page 54 for such criteria.

COMPETENCY: COMMUNITY AWARENESS

SKILL: Develop an awareness of community needs.

PURPOSE: to prepare workers for recognizing gaps in service delivery of community resources.

BEHAVIOURS:

1) defining a gap in services,

2) identifying the cause of the gap in service.

H4 - LEARNING ACTIVITY 1

The major purpose of the following activity is to help workers identify resources for clients that lie outside of the formal community resource network.

Step #1 - Ask workers to read the material "To Bridge or not to Bridge the Gap", on page 62.

Step #2 - Ask workers to fill out the list on page 63 as best they can.

Step #3 - Convene a group of workers and ask them to share the lists of resources they each have identified. As a variation to this, publish the lists of all workers and distribute them.

TO BRIDGE OR NOT TO BRIDGE THE GAP

Definitions:

1. Community resource need - any social need that is required by a significant number of persons within a locality.

2. Gap in service - an absence or lack of social service to an individual or group of persons.

All individual client needs for which community resources cannot be found may or may not point to a service gap. Why? A client's needs may be so personal, individual and special that there may be little or no call for the service on a mass scale. Thus, in such an instance, the service required may depend upon the field worker's ingenuity in discovering such resource for one time only.
For example:

a) one field worker has visited a diaper service and has obtained a bundle of used diapers for a client without any cloth diapers;

b) another field worker has contacted the local Kiwanis Club regarding his client who requires a specialized medical prosthesis; the Kiwanians have agreed to finance it;

c) a client must have an unusual medical operation and is flown to another community for it to be accomplished.

Therefore, individualized and unusual client needs can be met by canvassing the environment to discover ways of meeting these needs.

Below is a fictitious list of such resources which may suggest some possibilities.

Atherton City Lions Club

Lyle Street Boys Social Club

United Church of Wyeth

Terrysville I.O.D.E. Chapter

Haystown Rotary Club

Young Men's Business and Luncheon Assoc.

H4 - LEARNING ACTIVITY 1

Instructions:
List all the business, political, religious, social and educational institutions that are outside the channels of the community resource agency network, and who may meet individualized client needs.

NAME OF GROUP/ORGANIZATION	ADDRESS
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	

H4 - LEARNING ACTIVITY 2

The purpose of the following exercise is to help workers identify unmet needs in their workload district.

Step #1 - Ask the worker to read page 65.

Step #2 - Ask the worker to fill out the check sheet on page 66.

H4 - LEARNING ACTIVITY 2

Recognizing Unmet Needs

You, in your role of worker know the locality in which you work nearly as well as those that live in it. Workers know the problems clients have in living in the locality, and workers first hand observation of the locality gives an added dimension of knowledge.

What are the ways open to getting such knowledge?

a) Interviewing clients - knowing and understanding clients through active listening leads to awareness of their unmet needs.

b) Unsystematic observation - observing the area as a normal process of working in it.

c) Systematic observation - the field worker is in an excellent position to observe in a systematic way, the problems and strengths of his area.

d) Descriptive statements - another way the field worker can gain a good grasp of unmet needs is by asking his/her clients to write statements on such topics as "What My Neighbourhood Needs Most" or "What is the Biggest Need of People Living Around Me".

H4 - LEARNING ACTIVITY 2

CHECK SHEET OF PROBLEMS IN THE ____________________ LOCALITY

Instructions:
Check in the first column, those problems that you believe are the most serious, and in the second column, those you believe the locality can and should, do something about.

LOCALITY UNMET NEEDS	Which five are the most serious? (Check)	Which can and should the community do something about? (Check)
HEALTH SERVICES		
FIRE PROTECTION		
HOUSING		
YOUTH CLUBS		
SCHOOLS		
SANITATION		
ADULT RECREATION		
POLICE PROTECTION		
STREET MAINTENANCE		
RELIGION		
HUMAN RELATIONSHIPS		

Adapted from Irwin Sanders, Making Good Communities Better.

H4 - LEARNING ACTIVITY 3

The purpose of the following learning activity is to help workers clarify the causes and dimensions of gaps in community resources. Therefore, this learning activity logically follows learning activity 2.

Step #1 - Ask workers to read ______________________________

______________________________ for a general overview of clarifying the factors involved in resource gaps.

Step #2 - Ask workers to fill out the Needs Analysis Sheet on page 68, using one unmet need from the check sheet, learning activity 2.

Step #3 - Discuss with workers their analysis of the locality problem.

H4 - LEARNING ACTIVITY 3

Instructions:
Identify one serious unmet need from your check list (learning activity 2) on page 66. Analyze this problem, using the framework for analysis.

LOCALITY PROBLEM

(PROBLEM IDENTIFIED)

QUESTION	WAYS OF ANSWERING QUESTION
A. WHO SUFFERS FROM PROBLEM?	1. 2. 3.
B. HOW MANY SUFFER?	1.
C. WHAT ARE THE CONSEQUENCES TO THEM?	1. 2. 3.
D. IS THE PROBLEM RECOGNIZED IN THE LOCALITY, AND, IF SO, BY WHOM?	1. 2. 3.
E. DOES THE PROBLEM HAVE MULTIPLE CAUSES, AND IF SO, WHAT ARE THEY?	1. 2. 3.

QUESTION	WAYS OF ANSWERING QUESTION
F. ARE THE CAUSES OUTSIDE OF THE LOCALITY, AND WHAT ARE THEY?	1. 2. 3.
G. ARE SOLUTIONS LOCATED OUTSIDE OF COMMUNITY, AND, IF SO, WHAT ARE THEY?	1. 2. 3.

H4 - LEARNING ACTIVITY 4

The major purpose of the following activity is to enlarge workers' awareness of the possible needs of regions, as well as on a national level.

Step #1 - Ask workers to play the game of Social Balance on page 71.

Step #3 - Answers are provided workers on page 72. If wished, discuss these answers with workers.

H4 - LEARNING ACTIVITY 4

The Game of Social Balance

John Kenneth Galbraith has an idea that goes something like this: if private enterprise produces so many units of a product, the public sector will have to spend so much money to counteract or compensate for the effect of this production. For example, the increasing and continuing production of cars requires heavy public spending for roads and highways.
Below are a number of activities engaged in by the private sector. Choose an appropriate public action that coordinates with the private one.

PRIVATE SECTOR	PUBLIC SECTOR
Production of Commercial Aircraft	
Use of Technicians and Specialists	
Production of throw-away bottles	
Production of Processed Food	
Building Factories in suburban areas	
Policy of retirement from work at 65	
Production of plastic throw-away items	
Research by Drug Industry	

H4 - LEARNING ACTIVITY 4

Answer Sheet

1. Airport Construction
2. Expanded Educational Facilities
3. Recycling of Glass; Collection
4. Collection of Garbage from Cans, Wrappings
5. Transportation expansion
6. Increased Social Security Payments; Care for Aged
7. Research to solve problem of destroying non-biodegradeable materials
8. Federal agencies as watchdogs to deter sloppy and inaccurate research results

H4 - LEARNING ACTIVITY 5

The purpose of this activity is to help workers identify possible public issues that can be beneath private troubles. In so doing, workers begin to identify with the social reform aspects of social service.

Step #1 - Ask workers to read the instructions on page 74 and then to privately speculate on the public issues behind private troubles. As a variation of this exercise, convene a group of workers, and ask them to brainstorm faulty public policy reasons for private troubles. Ask them to consider remedies in social legislation.

H4 - LEARNING ACTIVITY 5

Private Troubles and Public Issues

C. Wright Mills believed that behind the private troubles that individuals, families and small groups experience were public issues that required resolution. As workers you deal daily with problems of poverty, family desertion and separation, child neglect and abuse, juvenile delinquency and crime. These problems are real, and require your strict and immediate attention. But the way you deal with them is not the only way to do it, for these problems stand for unresolved or contentious issues in the political realm. Why are there so many juvenile delinquents? What is it about our society that is leading it to increases in the rate of crime? What public answers have been attempted to these questions?

Instructions:
On the chart below are listed a number of problems, "private troubles", if you will. Identify in your own mind the public issues that stand behind each problem, and also suggest possible social reform measures to deal with these issues.

PRIVATE TROUBLE	PUBLIC ISSUE	REFORM ATTEMPTS
1. POVERTY	1. 2. 3.	1. 2. 3.
2. CRIMINALITY	1. 2. 3.	1. 2. 3.
3. MARITAL CONFLICT	1. 2. 3.	1. 2. 3.
4. CHILD NEGLECT	1. 2. 3.	1. 2. 3.
5. INDIVIDUAL ANXIETY	1. 2. 3.	1. 2. 3.
6. MENTAL ILLNESS	1. 2. 3.	1. 2. 3.
7. FEMALE DESERTION OF FAMILY	1. 2. 3.	1. 2. 3.
8. TEEN-AGE ALCOHOLISM	1. 2. 3.	1. 2. 3.

Monitoring the Recognition of Gaps in Community Resources.

1. Ask workers to identify all community resources to meet specialized client needs at the beginning of training. Ask them to make a list again in three months. It would be expected that as workers become more familiar with their locality and its resources that this list would get longer.

   A standard might be generated, based upon the baseline that each worker begins with. For example, one worker may be aware of two such resources at the beginning of training, and in negotiation with the worker, a goal of six such agencies is set for three months hence.

2. The workers may meet in group supervision for the discussion of their caseloads and client unmet needs as related to their neighbourhood locality. You might ask them to rate each other, say from a high of 5 to a low of 1, on how perceptive and knowledgeable they are about unmet needs. You may wish to add your rating to the rating made by each worker.

3. Ask workers to fill out a Check List of Problems in their locality. Compare their list of problems with those stated by other informational sources, e.g., newspaper reports, your knowledge, social planning body reports, research, etc.

4. Can the field workers, through group discussion, develop answers to the questions on the Needs Analysis Exercise? (see Pages 66-68).
   Here you are testing the field worker's capacity to go beyond the immediate client situation and to begin to conceptualize and analyze locality problems. Bi-Monthly group sessions may be set up to chart the progress of workers' capacity to analyze community problems. Criteria used to make evaluation might be:

   a) worker's rate of participation;

   b) worker's capacity to elaborate on peer's ideas;

   c) worker's awareness of provincial, federal and international forces that could be considered as partial causes of the unmet locality need;

   d) worker's ability to understand other's contributions to the discussion.

COMPETENCY: COMMUNITY AWARENESS

SKILL: To act on Community Needs

PURPOSE: To assist workers in taking actions that lead to fulfilment of unmet community needs.

BEHAVIOURS:

1) informing the public about unmet needs; and

2) initiate peer helping client groups.

H5 - LEARNING ACTIVITY 1

The major purpose of this activity is to help workers think through what persons and representatives of organization need to be approached when a particular community need is discovered.

Step #1 - Ask workers to complete the exercise on page 80. As a variation of this exercise, convene a group of workers to discuss the problems presented.

H5 - LEARNING ACTIVITY 1

Instructions:
When an unmet need has been identified, its probable causes analyzed, and its consequences documented, it is necessary to bring this information to persons who may be able to take action in meeting the needs. In this exercise list those persons, agencies, and organizations, who should be informed when a particular need has been discovered.

UNMET NEED	WHO SHOULD KNOW
1. A worker learns that there are no recreational facilities for young children in the locality, and many of the clients' children are "hanging out" in the pool hall.	
2. Many clients in the field worker's locality complain of an infestation of rats that prowl their backyards at night, feeding on garbage. The clients attribute the problem to only once-a-week garbage pick-up.	
3. A worker learns that many clients in his caseload area have received increases in their rent. Landlords have refused to improve the properties even though some rent increases have been as high as 20%. Clients are asking for paint for the halls of apartments, and better hall lighting fixtures.	

H5 - LEARNING ACTIVITY 2

The purpose of this activity is to help workers think imaginatively about ways to fill gaps in community resources.

Step #1 - Ask workers to complete the exercise on page 82. As a variation, convene a group of workers for a problem solving session regarding the presented resource problems.

H5 - LEARNING ACTIVITY 2

Instructions:
Consider different ways of solving the following problems.
Write your answers down under Solutions.

RESOURCE PROBLEM	SOLUTIONS
1. Field Worker identifies six mothers in his caseload that need babysitting services, which are unavailable in the community.	1. ______ 2. ______ 3. ______
2. Three field workers in discussing problems in their caseload discover an almost universal client need for nutritional information and meal planning.	1. ______ 2. ______ 3. ______
3. It is identified in a total staff meeting that mothers of small children need more information about the normal patterns of child development.	1. ______ 2. ______ 3. ______

SUGGESTED READING

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Ontario

Ministry of
Culture and
Recreation

Volunteers

How to find select and train

Volunteers

How to find select and train

The initial preparation of this book was done by Monica Armour, in consultation with a committee of experienced co-ordinators from community information centres. The manuscript was revised and edited by The Chapter House Inc. The illustrations are by Judy Mayer.

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Contents

Foreword

Volunteers is a guide for Community Information Centres to assist in the recruitment, selection and training of volunteer workers.

Our goal is to encourage Centres to use volunteers more frequently and in creative ways and to provide some guidelines for effective training.

Briefly, the guide deals with:

☐ identifying centre needs which can be met by volunteers

☐ recruitment and selection of volunteers

☐ matching skills and interests of volunteers with needs of the centre

☐ alternative training plans

☐ evaluation techniques.

The format is flexible. Use the checklists and work spaces to add your own and others' ideas. The suggestions we make are guidelines only — often we offer several techniques to solve a problem. The decision on which to use is yours. We welcome your comments on *Volunteers*. Your suggestions will assist us in the preparation of future guides.

Lola Bratty, Co-ordinator
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Section I/Why Volunteers?

Attitudes Toward Volunteers

The following statements are but two of hundreds that have been voiced about volunteer workers in community information centres.

Our volunteers are essential and super. We couldn't operate effectively without them. We're always eager to encourage appropriate people to work with us in a volunteer capacity.

I don't want anything to do with volunteers. Their presence makes more work for us not less.

Obviously, the attitudes and motivation to use volunteers vary a great deal among the paid staff in information centres.

We hope this guide will encourage you to view volunteers in a positive light. We have suggested different models and methods to use to improve your process of selection and training.

We begin with the clear bias that volunteers are important and necessary to the optimum functioning of a community information centre.

Why Centres Use Volunteers

- ☐ The use of volunteers is often the only solution to a situation in which too few dollars are being stretched across too many projects and services.
- ☐ Volunteers often have a great deal of personal experience and information invaluable to the centre and its clients.
- ☐ Volunteers present fresh and creative approaches to problems.
- ☐ The use of volunteers "humanizes" the service — the volunteers de-mystify the professions for clients.
- ☐ Volunteers often have specific community contacts, know where funding might be available, and know how to cut community or governmental red tape. (A volunteer with this kind of knowledge would be particularly useful as a board member.)

Why People Volunteer

Volunteer service:

- ☐ provides a learning and growing experience;
- ☐ is satisfying because it offers help to others;
- ☐ provides opportunities for increased social contacts, new friendships and relationships with others who share interests and concerns;
- ☐ provides opportunities to use present skills and to develop new skills and self confidence;
- ☐ provides a concrete work experience and educational activity which may eventually help the volunteer join the working force;
- ☐ provides an opportunity to repay personal debts to a society which may have helped the volunteer through his/her own rough times;
- ☐ is a constructive outlet for energetic use of leisure time.

Matching Centre Needs With Volunteer Needs and Skills

Careful matching of the needs of the information centre with the skills, interests and needs of volunteers is critical.

As a basic step toward the perfect match, you must clearly establish:

- ☐ What the staff wants volunteers to do;
- ☐ what the volunteers want to do;
- ☐ what the clients need from the agency.

Where the needs of staff, volunteers and clients overlap, the volunteer job emerges.

Jobs for Volunteers

The following is a list of tasks which volunteers can perform in information centres. Check those which could be handled by volunteers in your centre and write in additional tasks at the end. Also mark those which need not be performed in the centre itself. Some volunteers prefer, or are limited, to working out of their homes — they can still provide a needed service to your centre.

Volunteers can:

- ☐perform telephone duty, information and referral, provide advice and guidance;
- ☐telephone out, *i.e.* follow up to determine if a person received the service after referral;
- ☐update and add to resource files or referral banks;
- ☐serve on the board (advisory or directors);
- ☐do clerical work; typing, filing, duplicating, mimeographing;
- ☐provide transportation for elderly or disabled, both emergency and regular;
- ☐handle research, *i.e.* evaluation of the centre's services, functioning, client satisfaction, staff satisfaction;
- ☐translate both off and on the telephone;
- ☐make home-help visits; do housework and shopping, provide child care for the sick and care of the elderly;
- ☐provide a meal;
- ☐provide day care or babysitting for volunteers who could not otherwise work in the centre;
- ☐prepare publicity; write ads for newspapers, design brochures, make posters, post notices on community bulletin boards;
- ☐co-ordinate centre newsletter: collect items of news, write, print and distribute;
- ☐design method of collecting and using centre statistics;
- ☐do bookkeeping, keep track of finances;
- ☐clip articles from newspapers and local magazines which provide information on services available;
- ☐serve as volunteer co-ordinator;
- ☐serve as receptionist, taking messages during staff meetings, covering noon hours and other busy times, or full time;
- ☐recruit new volunteers;
- ☐help in selection of new volunteers;
- ☐perform special projects — income tax for senior citizens or immigrants, multilingual newspaper, research and compilation of directory of services for local agencies;
- ☐read to the blind;
- ☐locate goods or articles for the centre;
- ☐assist clients in finding temporary or permanent accommodations;
- ☐visit agencies or institutions, *i.e.* VD clinic or home for the aged to "get an idea of the atmosphere" and check out their services. Serve as liaison or link between the centre and the services to which clients may be referred;
- ☐represent the centre at annual meetings, agency and other meetings to observe and report, perhaps to speak about or on behalf of the information centre.

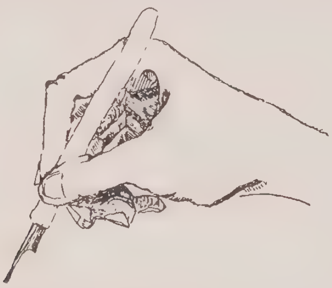
As you consider possible jobs for volunteers, keep an open mind. Old stereotypes about volunteers doing only the routine uninteresting work are no longer true. At times a volunteer may do more of the so-called "professional" work than a paid staff member. It may be necessary to use paid staff — rather than volunteers — to fill in the gaps, especially if your centre is dependent on volunteers for full staffing. No one person — including any paid person — has all the skills necessary to meet the needs of the centre. Encourage your staff, paid and volunteer, to complement and supplement each other.

Board of Directors

Remember your board of directors are also volunteers. These volunteers may be the most important you recruit. An information centre cannot function effectively without knowledgeable, committed board members to develop policy and initiate funding.

Job Descriptions

When someone, paid or volunteer, is selected to do a job it is critical that the agency and the individual each has a clear idea of the duties and responsibilities of that position. In the case of an information centre, job descriptions may be flexible depending on the current needs of the centre and the skills and interests of each volunteer. Whatever duties are decided upon, they should be clear and in writing.



Why a Written Job Description?

If the volunteer can read a description which outlines exact details of the job to be done he or she will feel secure; a feeling of security is essential to productive work. Uncertainty and ignorance create insecurity; they are the major causes of ineffectual work and misunderstandings among the staff.

A clear job description will help create a commitment to the job and to the centre. It is impossible to commit oneself to something unknown, ambiguous, or in a constant state of change. Information centres expect volunteers to be reliable. It is up to the centre to create working conditions conducive to strong commitment. A clear job description is one such condition.

The Job Description

A good job description should:

- ☐give a brief description or statement of the main function or purpose of the job;
- ☐state precisely to whom the worker is directly responsible, *e.g.* the volunteer co-ordinator, the supervisor or the administrator of the centre;
- ☐give a complete and honest list of specific duties and responsibilities;
- ☐state the suggested or required amount and type of previous experience;
- ☐list personal and professional competencies or characteristics that are important to do the job well.

Sample 1

We include samples of eight job descriptions designed by community information centres for both paid and volunteer positions. Use them as a guide to develop job descriptions for your volunteer positions.

The following is a job description for a volunteer co-ordinator designed by staff members of the Community Information Centre of Metropolitan Toronto (CIC Metro).

Functions of a volunteer co-ordinator

The volunteer co-ordinator should be sympathetic to volunteerism, completely familiar with the agency and its function, sensitive to the needs of volunteers, paid staff and the agency as a whole, and have skills in such areas as interviewing techniques, supervision, planning and assessment. The volunteer co-ordinator should be directly responsible to the Executive Director of the agency.

The volunteer co-ordinator will be responsible for

- ☐recruitment of volunteers
- ☐placement of volunteers (in conjunction with other appropriate staff, depending on volunteer job)
- ☐orientation of volunteers to the agency and its total function
- ☐on-going training program
- ☐direct supervision of volunteer jobs
- ☐liaison between volunteers and paid staff
- ☐scheduling volunteers' time
- ☐listening to volunteers' difficulties or problems with their direct supervisor
- ☐all other services/benefits to volunteers such as finding physical space, supplying appropriate working materials, reimbursing volunteers for their transportation costs
- ☐planning and development of ways in which the services and programs of the agency can be strengthened and extended through the use of volunteers
- ☐development of a manual about the agency to give to volunteers and a volunteer training manual
- ☐development of appropriate forms or guidelines to be used for assessment, placement, evaluation, etc. — possibly also a volunteer contract

Sample 2

This description was developed by the Community Information and Referral Service (CIRS) in Minneapolis, Minnesota, U.S.A.

Telephone Information Officer

Duties:

- ☐obtain through telephone interview sufficient factual information concerning a person requesting a service;
- ☐determine the agency or resource suitable to meet his needs;
- ☐give adequate information concerning the resource to the inquirer;
- ☐give information to any inquirer as to particular facilities, telephone numbers, etc.;
- ☐discuss any or all complex requests with professional staff or volunteer co-ordinator (whoever is most convenient);
- ☐all volunteers will meet with co-ordinator before and after their assignment.

Qualifications:

- ☐knowledge and understanding of agency programs, policies and procedures;
- ☐understanding of the role of CIRS in relation to the community and other agencies;
- ☐understanding of and sensitivity to the needs, attitudes and behavior of users of the service and ability to determine action in relation to need and urgency.

Hours:

- ☐Assignments will be made by volunteer co-ordinator.
- ☐It is of utmost importance that all phones be manned every day.
- ☐In case of necessary absence, please notify the volunteer co-ordinator as far in advance as possible so that arrangements can be made for a substitute.

Mrs. A. N. Other
123-4567

- ☐If emergency occurs on the morning you scheduled to work, please call Mrs. Other at 8:15 a.m.

Place:
Citizens Aid Building,
404 South 8th Street,
Minneapolis, Minn.

Sample 3

Director of Volunteer Services

Functions and status of the director of volunteer services

The director of volunteer services organizes and directs, under the general supervision of the administrator, a program to use volunteer services to supplement the work of regular agency staff.

Status of the director of volunteer services is equal to that of a department head or other major position in an agency.

Qualifications:

The position requires tact, initiative, creative thinking and good judgment in dealing with many kinds of people and in opening new avenues of volunteer service. It requires clarity of expression and ability to interpret agency program and policy to the general public as well as understanding of the professional goals within the agency.

This responsibility is highly important to agency public relations because of the continuous public contact it involves. It also requires the maintenance of free-flowing communication and rapport with other agency staff members.

It is recommended that the director of volunteer services have a degree from an accredited college or equivalent experience with focus on the understanding of human behavior and an acceptance of the philosophy of social services. Training in personnel administration or social work is recommended.

Duties and responsibilities

- ☐Administers the volunteer office, including the maintenance of records, and preparation of reports and budget.
- ☐Gives professional leadership to the volunteer program.
- ☐Maintains standards of sound volunteer practice in agency volunteer program.
- ☐In consultation with the administration and agency staff, plans for the use of volunteers, defines services to be performed by volunteers, and outlines duties for each assignment.
- ☐Assists in interpreting the functions and expectations of the volunteer program to all agency staff, board or committees and the community in general.
- ☐Interprets and implements policies, develops attitudes, procedures and objectives of the volunteer program.

Sample 3 continued

- ☐Recruits, interviews, and assigns volunteers and arranges for supervision.
- ☐Arranges for orientation of all volunteers to the agency setting.
- ☐Organizes volunteer training programs in co-operation with the agency staff and other organizations which train volunteers.
- ☐Arranges for recognition of volunteer service by such means as certificates, special meetings, use of insignia, publicity etc.
- ☐Follows up on volunteer performance and evaluates the volunteer program.
- ☐Orients agency staff members in the use and acceptance of volunteers.
- ☐Helps to promote and maintain morale of individual volunteers and their effectiveness as a group.
- ☐Works with individuals or groups who wish to give service or material assistance to develop projects that will be in sympathy with the donors' interests and suitable to the agency's needs.
- ☐Meets periodically with other local professional leaders in the field of volunteer services to discuss matters of mutual interest and concern.
- ☐Represents the agency, and stimulates community interest and participation in the volunteer program through attendance at meetings of organizations, clubs, church groups and civic bodies.

Administration considerations

- ☐The director of volunteer services arranges for supervision of volunteers but does not supervise them.
- ☐The director of volunteer services will work continuously with other staff members to encourage creative use and supervision of volunteers.
- ☐The lines of responsibility should be clearly drawn to prevent the volunteer office from becoming a catchall for programs desired by the agency but for which no other staff member takes responsibility.
- ☐The role of the director of volunteer services vis-a-vis volunteer staff should parallel that of the director of personnel vis-a-vis paid staff.
- ☐When the director of volunteer services has other duties and responsibilities, the administration must provide sufficient time for the execution of the volunteer program.

Sample 4

CIC Metro job description for new branch location.

Information Assistant

Description of Function:

- ☐part of volunteer/staff team at library location;
- ☐to handle first level of enquiry and explain services of CIC;
- ☐miscellaneous functions — updating, help with library display, etc.

Purpose of Job:

- ☐to enable CIC to provide service at library location.

Directly Responsible:

- ☐immediately to CIC staff person on duty at the library location;
- ☐ultimately to the volunteer co-ordinator.

Time Commitment:

- ☐minimum one-half day per week for one year.

Skills Needed:

- ☐communications or human relations skills;
- ☐some knowledge of social services and/or community involvement.

Training/Orientation Provided:

- ☐intensive initial orientation;
- ☐on-going training sessions;
- ☐on-the-job training.

Location of Job:

- ☐new library

Out-of-Pocket Expenses:

- ☐transit costs provided.

Sample 5

Three job descriptions for volunteers in Resource Office adapted from CIC Metro.

Resource Assistant

Qualifications:

☐limited skills but sincere commitment to volunteer work.

Commitment:

☐5 hours per week.

Duties:

Filing

☐non-directory sheets;

☐agency filing and government of Ontario filing including revision slips (under supervision),

☐catalogue cards, subject file cards, master file cards;

☐street file pages (under supervision);

☐order file, mailings, etc.

Checking

☐lists of organizations against master file for name, address, telephone and tracings on back;

☐tracings on subject file cards against accuracy of tracings on master file cards (under supervision).

Street file

☐deletions (under supervision).

miscellaneous

☐mailings (stuffing; not too much);

☐cutting paper for specific purpose e.g. LIP, income tax clinics, mailing list, scrap;

☐odd jobs.

Sample 6 & 7

Writer/Researcher

☐must be decisive and intelligent; have background or aptitude for social services; able to work with a minimum of supervision;

☐commitment: 7-14 hours a week for at least 6 months;

☐check incoming mail, reports, etc. for revisions to CIC files and verify;

☐verify and write up new information;

☐compile and verify information for seasonal projects;

☐other responsibilities as the need arises.

Resource Secretary

Qualification:

☐must have a definite usable skill like typing 50 wpm;

☐should be flexible, enthusiastic, able to work with a minimum of supervision.

Commitment:

☐6-8 hours a week for at least 6 months.

Duties:

☐keep street files up-to-date;

☐add new services to street files — consulates, senior citizens clubs, ethnic services, etc;

☐mapping of services;

☐re-ordering of pamphlets;

☐typing of master file cards, catalogue cards, subject file cards, stencils, etc.;

☐other duties as the need arises.

Sample 8

This volunteer job description (also from the Minneapolis agency) covers a wide variety of jobs. You can use it to develop several job outlines for volunteers working for brief periods during the week.

Volunteer job description

☐ Help phone-clients solve their problems by:

(a) referring them to the proper resource;

(b) making collateral calls;

(c) giving them information;

(d) brief casework;

(e) following up on disposition — using case card file;

(f) occasionally making appointment for client at resource;

(g) being an advocate for them.

☐ Keep statistical records.

☐ Read staff minutes, current clippings, brochures, newsletters, etc. plus initial volunteer training material.

☐ Transmit to director any cases of unusual interest or information helpful to the whole staff.

☐ Check and co-operate with entire staff to see that there is adequate coverage at all times — phones and front desk.

☐ Assist in preparation of senior citizens directory, brochures and other PR material.

☐ Speak or show film on CIRS, participate in fairs, etc. explaining our services on a volunteer basis.

☐ Be alert to getting on mailing lists for newsletters, brochures CIRS should be receiving.

☐ Confer with volunteer co-ordinator as to progress of volunteer experience and satisfaction.

☐ Mail printouts for resource updating.

☐ Attend all training sessions.

Section II/Finding & Selecting Volunteers

Recruitment: Where and how to find volunteers

You may plan an advertising or publicity campaign with the specific goal of recruiting volunteers but more likely the potential volunteer will be drawn to your centre through exposure to the on-going publicity of the service.

There are many specific sources and methods for recruitment.

☐Contact clubs and organizations in your community, particularly those which are service-oriented or those which attract people with the skills and interests you are looking for in a volunteer.

☐Place signs and cards in public transit vehicles and/or taxis.

☐Pin up recruitment notices where people congregate, *i.e.* laundromats, grocery stores, community centres, bowling alleys.

☐Contact retirement counsellors in business and industry. People are often eager to create new and meaningful lives for themselves after retirement.

☐Contact the Newcomers Club and Welcome Wagon.

☐Ethnic clubs and organizations may be a rich source of usually untapped volunteer potential.

☐Bulletins and bulletin boards of the local public library, churches, home and school association, ratepayers groups.

☐Professional associations such as accountants, bank managers, public relations people are all potential sources of volunteer help.

☐Use your local cable T.V. station as a possible recruitment source.

☐Send a press release on your need for volunteers to local newspapers and radio stations.

☐Your own staff (paid and volunteer) may be the best source of all. Their own involvement will make them enthusiastic recruiters.

Try at least two or three methods of recruitment. If the results don't fulfil your need, try others.

Selection

The selection process is important: a mistake in the initial match between the volunteer's needs and skills and the centre's goals and objectives will lead to problems.

Careful selection will:

☐reduce the amount of training;

☐reduce the chance of hiring the wrong person and having to fire him/her;

☐help both the volunteer and the centre feel more confident and secure;

The steps in a selection process:

☐The potential volunteer applies.

☐The volunteer is interviewed.

☐The interview is evaluated.

☐The volunteer is accepted or refused with thanks.

1. The potential volunteer applies.

The volunteer's initial contact asking about work at the centre usually occurs by telephone. That first conversation is the start of the selection process. When potential volunteers call, refer them to the person directly responsible — usually the director or volunteer co-ordinator. During that call, the assessment begins:

☐How does the person sound — warm and friendly, or distant? Easy to understand? Articulate?

☐Does he/she seem genuinely interested in performing a service, or more in need of social contact?

☐Does the content of the conversation lead you to believe there may be other ways the person could serve aside from the telephone?

☐What are your impressions of telephone manner and general behavior?

Sample 9

The director or co-ordinator should answer the caller's questions but should not conduct a lengthy telephone interview. If the caller insists on detailed information, tell him/her those questions will be answered in the personal interview. Emphasize that a personal interview is required for all potential volunteers. Explain in a friendly, but direct way that a volunteer job is as important as a paid position and therefore requires a careful selection procedure for the benefit of both the volunteer and the centre.

Make careful notes during that initial call of inquiry. Include your observations of the above characteristics, the content of your conversation, plus any other relevant information. The potential volunteer's employment file begins with those notes. Mail, or ask the volunteer to pick up an application form (see samples), then arrange a time for the interview.

It is important to follow up expressed interest quickly.

The following is a short, basic form developed by the staff of the LINK Centre in North York.

Application Fact Sheet

NAME: (Mr., Mrs., Miss) ____________________
ADDRESS: ____________________
____
TELEPHONE: ____________________
WORK EXPERIENCE: ____________________
____
____
VOLUNTEER EXPERIENCE: ____________________
____
____

Sample 10

A longer application form will provide more specific details about the potential volunteer's skills and attitude. It will also emphasize the responsibility involved in volunteer work.

The information given in the application will help you to structure the interview. You will have a head start in your assessment of the volunteer's potential.

Application Form for Volunteers

NAME: ____________________
ADDRESS: __________ TELEPHONE: __________
____
GENERAL LEVEL OF FORMAL EDUCATION: ____
WORK EXPERIENCE: PAID AND VOLUNTEER:
SETTING ____________________
TIME PERIOD ____________________
JOB TITLE ____________________
BRIEF DESCRIPTION OF DUTIES __________
____
____
(please use the back of this sheet if you need more space)
OTHER EXPERIENCES AND INTERESTS:
(*i.e.* hobbies, travel, etc.)
____
____
____
(please use the back of this sheet if you need more space)

1. Why are you interested in doing volunteer work at the centre?
2. What do you hope to contribute to the work of the centre?
3. What do you hope to gain from being a volunteer worker here?
4. How much time are you prepared to devote to this work?
5. Are you able and/or prepared to commit yourself to a regular time schedule of not less than three or four hours per week?
6. Would you be available for special projects that might be of a short term but intensive nature?
7. Do you prefer to work at the centre or at home?

2. The Volunteer is Interviewed

The interview is the most crucial part of the selection process. It will allow you to:

☐determine what skills or potential skill the person possesses;

☐learn what motivated him or her to apply;

☐learn how this person's goals and needs fit with those of the centre;

☐describe the work involved so the volunteer can make an informed decision as to whether or not he or she wishes to work at the centre.

To assure a successful interview, the interviewer should:

☐provide a short introduction to the centre, its purposes, function in the community and history;

☐provide a complete job description;

☐describe the terms of volunteer employment;

☐be prepared with a list of questions to ask the applicant to glean the necessary information for constructive and accurate evaluation;

☐fill out an evaluation or observation sheet to assess personality characteristics and qualities or skills immediately after the interview.

Who does the interviewing?

To achieve a balanced evaluation, it is often advisable to have more than one person conduct the interview. While one person asks questions, the other(s) can observe the applicant's behavior and responses. The interviewers can switch roles as the process develops. Possible interviewers might include:

☐the centre director,

☐the volunteer co-ordinator or director,

☐other experienced volunteers.

While it is important to have more than one interviewer, it is equally important not to have too many. Four or five interviewers might overwhelm and intimidate the potential volunteer. A committee of two or three is ideal.

Effective interviewing requires skill. The interviewers should have some training so they can pick up both verbal and non-verbal cues.

To develop these skills, conduct training sessions using a resource person from the cummunity or a professional consultant. Such a training session could be jointly sponsored and attended by potential interviewers from several centres and agencies.

Allow sufficient time and privacy for a thorough, unhurried interview. Ringing phones and interruptions will distract both interviewers and interviewee. Comfortable seating and a cup of coffee or tea will help everyone relax.

Things to remember when you conduct an interview

☐Put the potential volunteer at ease with general conversation — small talk.

☐Give a brief history of the centre and the services it offers.

☐If the volunteer is being considered for a specific job, provide the job description.

☐Ask questions about the volunteer's interests, experience, home situation, attitudes.

☐Explain the centre rules regarding the trial period, attendance training programs and supervision.

☐Encourage the volunteer to ask questions about the centre and the job.

☐Give a tour of the centre.

☐Both you and the volunteer will need time to evaluate what you have learned about each other — arrange to call in three or four days to discuss the final decisions.

Sample 11

LINK at the North York Public Library has a fine set of "Interviewing Guidelines." They are included in their entirety here for you to review and incorporate parts of them into your own interview schedule.

Interview Guidelines

The purpose of this interview is to enable the Interviewer to gain an insight into the potential the prospective volunteer has for LINK work.

Points to look for are:

☐listening ability

☐empathy

☐grasp of concept of LINK

☐frankness

☐diplomacy, tact

☐humor

☐patience

☐resourcefulness.

To establish motivation, it is recommended that this interview begin with the interviewer asking how the prospective volunteer became interested in volunteering for LINK.

Questions for exploration here might be:

☐What makes a good LINK volunteer?

☐What qualities does the prospective volunteer see she possesses in this regard?

☐Resourcefulness in researching for answers to telephone calls is of prime importance. How does the potential volunteer see this in operation? Give example.

☐What kind of communication is the prospective volunteer most comfortable with (face-to-face, group, phone)?

☐How personally involved with the calls does the potential volunteer see herself becoming? Explore difficulties.

☐How necessary is follow-through?

It is important to stress to potential night-shift volunteers that there are many slack periods, and ask for their reactions to this.

A discussion of a variety of LINK calls and how the prospective volunteer would handle them will reveal attitudes, prejudices, etc.

☐abortion

☐VD

☐drunk calls

☐homosexuality

☐nuisance calls

☐I'm lonesome/worried/upset/angry

☐calls of the "yellow pages" variety

☐tradesmen — electrician/plumber

☐I have no lights/no place to live/no money, etc. (check out these calls to see if any agencies are involved and get names, telephone numbers, etc. so that LINK is not duplicating service)

☐distress — suicide/fear

An accepting, non-judgmental, neutral attitude is of absolute importance in handling LINK calls. The potential volunteer must be able to commit herself in this regard.

The interview will proceed from this point to a brief tour of the LINK office.

At the end of the tour, arrangements will be made with the prospective volunteer for the interviewer(s) to call for final decision.

Sample 12

3. The interview is evaluated.

Each interviewer may jot down comments as the interview progresses — then compare notes and impressions after the potential volunteer has left.

An evaluation chart can also be used. It should be filled out immediately after the interview by each of the interviewers — in order to capture first impressions.

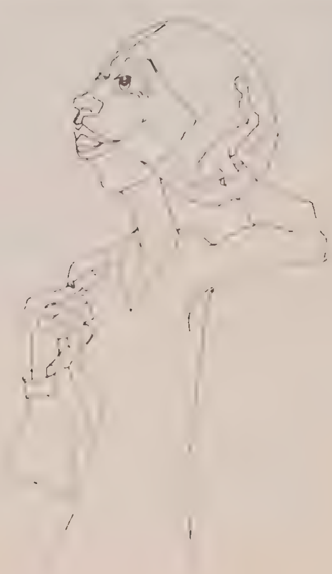
Interview Evaluation Chart

Name: ______________________
Interviewed by: ______________________
Date: ______________________

Rate the applicant on all of the following dimensions:
S = Superior A = Average P = Poor

	S	A	P
1. General appearance:			
Neatness			
Appropriate mannerisms			
2. Alertness:			
Intelligence			
Sense of humor			
Resourcefulness			
3. Speech			
Voice tone			
Articulation			
4. Personal traits:			
Tactfulness			
Enthusiasm			
Creativity			
Patience			
Responsiveness			
Personal stability			
Listening ability			
Empathy			
Frankness			
Awareness of personal bias or prejudice			
Ability to set aside personal bias and prejudice			
5. Views			
Understanding of concept of centre			
General awareness of community			
6. Background:			
Education			
Work and/or volunteer experience			
7. Attitude:			
Openness			
Commitment to work			
Ability to accept constructive criticism			
Capability to adapt			
8. Ability to do the job:			
Chances of being accepted by co-workers			
Attitude toward developing needed skills			
Working style			
Alone			
Team			

9. Additional comments:



4. The volunteer is accepted or refused with thanks.

The application and interview stages are completed. You and the potential volunteer have arrived at a critical moment — you both must make a decision to accept or reject. Within two or three days after the interview, you, as the centre representative, must call the potential volunteer. If your group has decided the volunteer will fit in well at the centre, tell him or her you appreciate the offer of service and would like him or her to join your group. If the volunteer accepts, then outline details of the training session (dates, times, etc.) and arrange for the volunteer to sign the volunteer agreement. Be sure to follow up the telephone conversation with a letter or memo confirming the verbal arrangements.

If your group decides this person will not be a suitable candidate for the centre, someone must so inform the volunteer. You must be tactful in conveying this decision. You can diffuse the responsibility for the decision because more than one interviewer was involved; still, you must be honest about the reasons. If the volunteer has arrived at the same conclusion, your task of rejection is a little easier. Simply thank the volunteer for the offer of service and wish him or her well.

When you do turn down someone's offer of service, try to suggest other volunteer options in the community or help the person find a way to learn the skills necessary to qualify as a volunteer in the centre. This conversation will be almost a counselling session (depending on the amount of emotional invesment the applicant has for working in the centre). A personal meeting may be necessary to discuss why the match is not suitable and to assist in identifying other options. It is important that the volunteer not see himself or herself as a failure because of your rejection. Point out his or her strengths and where they may be best used. If the qualifications necessary for performing the job are spelled out clearly during the interview, the unsuitable applicant will be better able to graciously accept a "no thank you" to his offer of service.

A number of information centres have a policy of three-to-six-month trial period for new volunteers. At the end of this trial period, the volunteer and the centre staff can evaluate the volunteer's performance and can mutually decide whether or not the volunteer will continue to work with the centre (see Section III, Training Volunteers.)

The Centre/Volunteer Agreement

A shared, written agreement between centre and volunteer is essential because:

☐ It spells out the reciprocal commitment of the volunteer and information centre to reach the shared goal of meeting client needs.

☐ It clarifies the commitment of the volunteer and the centre to meet each other's needs. It should list the benefits the centre extends to the volunteer. For example, transportation to and from the centre, day-care for young children, special training courses, financial reimbursement for expenses incurred on the job and so on.

☐ It should specify job and time commitments as agreed upon by both parties. It should include a brief description of duties, details on lunch hours, coffee breaks, vacation times and what to do when the volunteer cannot be at work at the appointed time.

☐ It should detail the contract period. Each volunteer should be willing to commit himself or herself to a certain work period, so the training investment made by the volunteer and the centre will be worthwhile.

☐ Finally, it should include the conditions under which the work relationship between volunteer and information centre might be terminated by either party.

The following centre/volunteer agreements may not entirely fit the needs of your centre but you may pick and choose among them for pieces of useful information.

The first is excerpted from "Profession: Volunteer" by Ellen Sulzberger Straus, reprinted by permission from *McCall's* magazine, March 1972.

Sample 13

Profession: Volunteer

The Volunteer Agrees:

- ☐ To accept the guidance and decisions of the director of volunteers;
- ☐ To carry out duties promptly and reliably;
- ☐ To use space and equipment only for work assigned and only at authorized times;
- ☐ To maintain the dignity and integrity of the agency with the public and honor confidential information;
- ☐ To sign in and out, to accept evaluation and notify the agency in writing — with appropriate notice — of extended leave or resignation;
- ☐ To understand the function of the paid staff, maintain a smooth working relationship with them, and stay within the bounds of volunteer responsibility;
- ☐ To participate in meetings with the agency.

The Agency Agrees:

- ☐ To appoint a director of volunteers responsible for hiring, firing, supervising;
- ☐ To provide the same space, equipment, working conditions, and privileges as given to paid staff who are doing similar work;
- ☐ To protect the volunteers from any claims that might result from their authorized activities;
- ☐ To evaluate volunteer performance on a regular basis, keep an account of volunteer hours, advance volunteers to greater responsibility if they deserve it, and provide a letter of recommendation when requested;
- ☐ To train paid staff members to utilize the volunteers effectively;
- ☐ To give volunteers an opportunity to meet regularly with agency administrators.

Sample 14

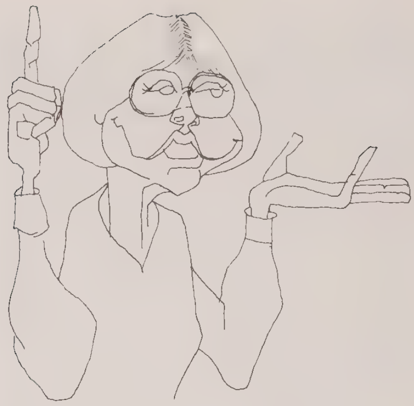
A Volunteer's Viewpoint

If you want my loyalty, interests, and best efforts, remember that ...

- ☐ I need a sense of belonging — a feeling that I am honestly needed for my total self, not just for my hands nor because I take orders well.
- ☐ I need to have a sense of sharing in planning our objectives. My need will be satisfied only when I feel that my ideas have had a fair hearing.
- ☐ I need to feel that the goals and objectives arrived at are within reach and that they make sense to me.
- ☐ I need to feel that what I'm doing has real purpose or contributes to human welfare — that its value extends even beyond my personal gain or hours.
- ☐ I need to share in making the rules by which, together, we shall live and work toward our goals.
- ☐ I need to know in some clear detail just what is expected of me — not only my detailed task but where I have opportunity to make personal and final decisions.
- ☐ I need to have some responsibilities that challenge, that are within the range of my abilities and interest, and that contribute toward reaching my assigned goal.
- ☐ I need to see that progress is being made toward the goals that we have set.
- ☐ I need to be kept informed. What I'm not up on, I may be down on. (Keeping me informed is one way to give me status as an individual.)
- ☐ I need to have confidence based upon assurance of consistent fair treatment, recognition when it is due, and trust and loyalty. These bring increased security.

In brief, it really doesn't matter how much sense my part in this organization makes to you — I must feel that the whole deal makes sense to me!

Sample 15



Rights and Responsibilities of Volunteers

Rights

A volunteer has the following rights:

☐to be treated as a co-worker;

☐to be given a suitable assignment;

☐to know as much about the organizations as possible;

☐to receive training for the job;

☐to receive continuing education for the job;

☐to have regular evaluation of their volunteer performance;

☐to be given sound guidance and direction;

☐to be given promotion and a variety of experience;

☐to be heard;

☐to be recognized;

☐to receive enabling funds when needed.

Responsibilities

A volunteer has the following responsibilities:

☐to be sincere in the offer of service and believe in the value of the job to be done;

☐to maintain the dignity and integrity of the community service with the public;

☐to carry out duties promptly and reliably;

☐to accept the guidance and decisions of the co-ordinators of volunteers;

☐to be willing to learn and participate in orientation, training programs, meetings, and to continue to learn on the job;

☐to understand the function of the paid staff, maintain a smooth working relationship with them and stay within the bounds of volunteer responsibility;

☐loyalty to the community service work he/she works with.

Rights & Responsibilities of Volunteers was written in 1972 by the Voluntary Action Resource Centre in Vancouver, B.C.

Training of New Volunteers

The training of the volunteer began with the selection interview. During that interview the volunteer was acquainted with the centre, its goals, its achievements, the physical layout and the details of the job to be done. The volunteer has also been introduced to staff and/or volunteer workers in the centre and hopefully has a "feel" for the climate and nature of relationships between workers in the centre. The commitment between the centre and the volunteer has been clearly defined.

The training program must be directly related to that commitment. It must be designed so that the needs of the centre can be fulfilled by the new volunteer.

Some centres conduct formal training courses, others use an informal structure. The choice will depend on the number of volunteers starting work at the same time, the nature of the jobs they will do and the resources you have for training purposes. Group training is often not appropriate because volunteers start work at various times.

A few training methods are:

☐ Brief orientation and training on the job — an apprenticeship. Staff person teaches the volunteer on the job, observes while the volunteer performs the task on his or her own.

☐ A structured training program involving three or more volunteers, who start work at the same time. This program may run from two to six or more sessions, depending on the complexity of the centre and the nature of the work to be performed.

☐ A combination of structured training program and an apprenticeship.

☐ In-service or continuing development such as monthly lectures, workshops and/or sharing sessions in which old skills are renewed or brushed up, new information is conveyed, new programs are developed and appropriate training provided.

Purposes of Training

The purposes of training are:

☐ to help new volunteers start their work;

☐ to help them understand the information centre, its goals, history, who works there, what they do, what kinds of clients the centre has. In short, to provide an over-all orientation to the centre;

☐ to inform the volunteers what is expected of them in the centre in the way of specific work activities or skills;

☐ to help them learn those skills and the means of applying them;

☐ to provide a climate for learning in which the volunteer continues to grow on the job; perhaps a better way to say this is to help the volunteers learn how to learn;

☐ to provide the co-ordinator with an opportunity to learn the strengths and weaknesses of the volunteers;

☐ to keep all staff up-to-date through on-going training.

Principles of Learning

It is important to consider some principles of learning which apply in any training or learning situation. These are quoted from Calvin and Glaser's book, *The Management of Training: A Handbook for Training and Development Personnel.*

☐ Learning proceeds most effectively when the learner's correct responses are immediately reinforced.

☐ Practice in a variety of settings will increase the range of situations in which the learning can be applied.

☐ Learning with understanding is more permanent and more transferable than rote-learning or learning by some memorized formula.

☐ People learn more effectively when they learn at their own pace.

☐ There are different kinds of learning and they may require different training processes. (See Skill Development, Page 23)

Questions to consider as you plan a training program

☐What do the volunteers need to know to begin the job?

☐What do they need as they go along?

☐How can you relate the specifics of the learning to the volunteers being trained — their lives, their experience, their community?

☐How can training make your volunteers more self-assured and skilled?

☐Is the training timed so as to be useful? A bit at a time is better than all at once.

Who Does the Training?

There are several possibilities. You can look for an experienced outside person or you can use the centre co-ordinator or volunteer co-ordinator. They will use their knowledge of the centre and the nature of the job to be done. You may find it helpful to enrol staff members in a how-to-train-volunteers workshop. Experienced volunteers can and should be trained then given an opportunity to train new volunteers. They are closest to the new volunteers because of their own experience. It will also provide them with an opportunity for new growth and learning.

Every person — staff or volunteer — who is assigned to training others should know the basic principles of training. Many trainers and training programs are failures because of the fallacious assumption that anyone who can do something well can teach it. This assumption does not take into consideration a possible lack of training know-how and understanding of the learning process.
from *Recruiting, Training and Motivating Volunteer Workers* by Arthur Pell

Planning the Training Program

Plan the training program carefully using sound principles of program planning.

☐Identify what needs to be done to train this specific volunteer or group of volunteers.

☐Define the specific training objectives.

☐Consider your priorities for training and choose those that are most immediately important.

☐Design methods and materials for training.

☐Choose who will do the training.

☐Hold the event.

☐Evaluate the training. The evaluation should tell you how well your objectives were met in this training program and provide you with feedback for future training.

Use all available resources in designing your program. There are many books and handbooks available. One resource which is particularly helpful in the early planning stage is Chapter VIII, "Training: Designing Creative Learning Experiences" from Marlene Wilson's book *The Effective Management of Volunteer Programs*. (See bibliography.)

Where possible, build the training program around the volunteers' previous experiences. Start where they are comfortable and gently guide them to where you want and need them to be.

In order to plan effectively, you must know what you want each person to do, how his or her job fits in with the rest of the agency. Once volunteers are on the job you can observe areas of skill or attitudes which need to be developed or changed. For example, the volunteers must understand the centre's policy and attitude in dealing with a client who is seeking an abortion or treatment for suspected venereal disease (especially if it differs from a volunteer's own philosophy).

Apprenticeship is also useful as part of the initial training program. An apprenticeship helps to quickly establish the relationship between the new volunteer and the supervisor. (See Supervision of New Volunteers, Page 24.)

Sample 16

Program Planning Checklist

☐Are time and personnel for volunteer orientation included in your planning for the use of volunteers?

☐Do all individual and group volunteers working in your program understand why their assignments are important?

☐Do they understand how their assignments fit into the total program?

☐Have they been given a place to work and keep their belongings?

☐Have they been introduced to paid staff members and other volunteers?

☐Do your volunteers know what is expected of them in regard to: performance, appearance, conduct, confidentiality, attitudes toward clients, acceptance of supervision?

☐Can they differentiate between the role of the volunteer and that of paid staff?

☐Have you prepared manuals or other printed material to remind volunteers of the things they need to know? Have you acquainted all volunteers with the program's total facilities and with the names of department heads?

☐Are your volunteers sufficiently informed as to the agency's purpose, program and philosophy to discuss these intelligently with families and friends?

☐Do you give volunteers an opportunity to acquire the skills needed for a particular assignment through: informal instruction, formal training programs, consistent on-the-job training?

☐Have you explored community resources for types of training you cannot provide?

☐Do you provide for on-going training through periodic volunteer meetings, attendance at outside workshops, discussion sessions, suggested reading materials?

Alternative Models for Training

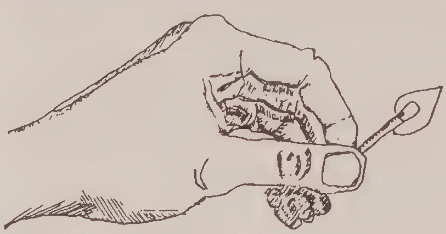
No one model or system has all the answers, so familiarize yourself with several and take those parts of each which will best facilitate the training of volunteers in your centre. We include three models in the text of this book which outline different methods of training. We also include a valuable training tool in the Appendix: the *DACUM Manual on Competency: Community Awareness* which was developed by B. Gelfand for the Ministry of Community and Social Services, Training and Staff Development Branch. Many of the exercises in this booklet are designed to teach specific skills as well as general ones.

Adapted from "A Demonstration Training Course for Agency Staff Members on How to Work With Volunteers"

Phase I
Job Induction — introduces the volunteer to his specific assignment; informs the person of what his/her duties are and how he/she is to perform them; introduces the volunteer to the immediate work setting, and to those with whom he/she will work, those who will guide and to whom he/she is responsible. This process gives the volunteer the knowledge and information to undertake his/her work with adequacy and satisfaction.

Phase II
Orientation — introduces the volunteer to the organization or agency: its purpose, history, programs and organization and enables him/her to see the relationship of his/her responsibilities to the operation as a whole. It familiarizes him/her with the general work setting, with the over-all policies and regulations that govern the work, and with the personnel provisions which affect him/her. It should stimulate, inspire, "light fires," and develop attitudes of support and enthusiasm for the agency and its mission.

Phase III
In-Service Training — aims at the continuous strengthening of the volunteer staff member on the job. It is continuous throughout the work experience. It involves supervisory guidance geared to meet individual needs and group training geared to meet group needs. As the volunteer grows in his/her job and becomes more independent the supervisor can move on to other activities — the volunteer will assume greater responsibility for his/her work and feel as important a part of the agency's program as a member of the paid staff.



Sample 17

LINK Volunteer Training Program

The LINK Volunteer Training Program was designed by staff at LINK Information Centre of the North York Public Library. The training sessions for new volunteers are run by the co-ordinator of LINK, with the help of experienced volunteers. Each training group is made up of a number of people so the emphasis of each session shifts to fill the specific needs of the groups.

The training program lasts three weeks, two half-days per week. It is divided into three content areas.

Content Area I — Orientation to LINK:

☐ background of LINK, the agency involvement in setting up of the files, etc.;

☐ concept of LINK, our structure, ideals, involvement with community;

☐ LINK volunteers, volunteer committee;

☐ LINK management committee;

☐ other information centres, Federation of Information Centres feedback;

☐ responsibilities of the volunteer to LINK;

☐ responsibilities of LINK to the volunteer.

Content Area II — LINK office procedures:

☐ information, files, binders, etc.;

☐ general discussion of calls, reaction to certain types of calls;

☐ description of major agencies and how they operate; *e.g.* legal aid, family services, volunteer groups throughout North York, Care-Rings, etc.

Content Area III — Work session:

☐ examples of common calls, how to handle them, things to watch for, interviewing skills;

☐ discussion of reactions;

☐ role playing of calls between co-ordinator and experienced volunteer, new volunteer observes and criticizes handling of call;

☐ examples of distress calls, role playing of problem calls, stress listening skills, human reaction;

☐ confidential files, supportive aid calls;

☐ handling of special requests — transportation, volunteer services, interviewing skills;

☐ services we offer — student registry, reading and writing for seniors, etc.; services we *don't* offer — room rental, etc.

Sample 18

Excerpted from *Recruiting, Training and Motivating Volunteer Workers* by Arthur Pell

1. Preparation: The trainer and the trainee should be prepared for training. The trainee should be put at ease, told generally about the work that is being done and how this step will aid it. The trainer should determine what the trainee already knows about the subject and use this as a taking-off point in teaching new material.

2. Present the Operations: Tell, show and illustrate one important step at a time. If the volunteer is being shown how to index records, first tell how to do it, then the trainer should do it, explaining how the records are indexed and stressing any complexities that are incumbent. Instruction should be clear, complete and patient. The trainer should be sure the volunteer understands what has been shown and why. A person learns faster if there is an understanding of the reason for what is being done.

3. Perform the Task: Have the volunteer do the job while the trainer observes. Have the trainee explain why each step is being done, while doing the actual job. The trainer will correct errors and show how to overcome difficulties. Developing skill and confidence comes with repeated successful completion of the tasks. Trainers can aid the volunteer in developing confidence by enthusiasm and praise.

4. Follow-up: Once the trainer feels that the volunteer is able to do the job, the person should be told to do so, and told where to go for help (the trainer, supervisor or sponsor). The trainer should check back frequently at first and gradually taper off until only occasionally supervision is needed.

Remember

If the volunteer is to feel truly a part of the centre, his or her training should be similar to, if not the same as, that of paid staff. If they start at the same time, train new staff members and volunteers together. Volunteers play an integral part in the working life of the centre. Their commitment to the work will be strengthened if they are treated as responsible staff members and do not feel that they are on a different rung on the status ladder.

Skill Development

Two types of skill development are involved in the training of volunteers for community information centres — general skills and specific skills. The training activities must be directed at ensuring that those appropriate and needed skills are fully developed.

General skill development involves:

- ☐the teaching and learning of skills which are usable in a variety of settings and situations;
- ☐the creation of an awareness of when a specific skill is required;
- ☐development of an ability to make the decision and act upon it.

Most new volunteers will have some of the general skills — that is one of the reasons they were selected in the first place.

Specific skill development involves:

- ☐the identification, in writing, of what the new volunteer must be able to do;
- ☐the specific mention of every aspect of that skill, including the kind of social behavior required and the sequence of steps in performing the skill — all in writing;
- ☐teaching the specific skill using every tool you can. Have written directions. Allow the new volunteer to observe an experienced person perform the task, then give him or her an opportunity to practise, first with supervisory help to accompany the written directions, then on his/her own.

Rely on centre staff and current volunteers to identify which specific skills are needed for each particular job.

Chances are your new volunteers will need to develop old skills as well as new ones. Structure the training program accordingly. If your volunteers need to learn to listen better, use communication exercises in active listening. If they need to learn how to offer options to a client instead of giving biased patronizing advice, use a program to develop counselling skills. If they need to learn to be better decision-makers, a session on decision-making aids and techniques will be helpful.

A note of caution: You may wish your volunteers to master an enormous amount of knowledge and develop many new skills by the time they are through the training program. But be realistic about the amount of time you and they have to give. Learning will begin and continue once they are on the job.

Be flexible

The most important consideration in training — be flexible. Opportunities for innovation, creativity and alternative ways of doing the same job by the new volunteer may be discouraged or squelched if the trainer is too rigid. If your trainees come up with a different way of performing a task — let them try it out. If it is as effective and efficient as your current method, reward them for putting forth the effort and encourage further creativity. If it doesn't work, don't use it, but don't discourage independent and innovative thinking. Through our errors we learn new and better ways of doing things. When possible, allow people to use the method that works best for them. Your main goals are to get the job done and to make the workers feel themselves an integral part of that job.

Tips for better training from *Recruiting, Training and Motivating Volunteer Workers* by Arthur Pell.

- ☐Don't talk down to trainees. Volunteers are usually adults and many are experts in their specialties.
- ☐Let the trainees express themselves. Education should be a shared experience between the student and the teacher to be successful.
- ☐The trainer should not do all the talking. In long sessions, use more than one person to aid in training.
- ☐Don't teach by the book. If there is written material on the subject, assume the trainee will read it. Use it as a basis for training and augment it with illustration and demonstration.
- ☐Prepare for each session.
- ☐In training several persons at the same time (*e.g.*, class as opposed to individual instruction), organize the group so that people with the same level of knowledge of the subject are in the same group. This will avoid being above the head of some trainees and too elementary for others.
- ☐Keep sessions short. Each session should be from one to two hours. Longer sessions usually fail to keep the student's attention and enthusiasm.
- ☐Keep the material as interesting as possible. In showing the volunteer specific tasks that must be done, tie them in with the over-all work of the organization so the relationships can be seen.
- ☐Use visual aids where applicable and demonstrations in addition to just talking about a subject.
- ☐Summarize at the end. Set aside the last five or 10 minutes of each session for a complete summary to clear up misunderstandings. Encourage questions and be sure they are fully answered.

Volunteer Manuals or Handbooks

Many agencies have developed a manual or handbook for staff and volunteer training. However, manuals are not a substitute for training, they are a training tool. The advantage of a reference manual is it will always be available to the volunteer while a staff person may not be. When volunteers need to check on a procedure or refresh their memories, they can consult the manual rather than interrupt another staff member. Use the talents of an experienced volunteer or group of volunteers to develop such a manual.

A manual for staff and/or volunteers of an information centre should include details on:

- ☐ purpose of the centre;
- ☐ functions of the volunteer workers;
- ☐ functions of the regular staff;
- ☐ a code of ethics; (This is especially important if the volunteer will be working with confidential information.)
- ☐ Do's and Don'ts of dealing with clients;
- ☐ relations with other staff members;
- ☐ rules pertaining to dress, smoking, etc.;
- ☐ what to do if unable to report on time for work;
- ☐ attendance and punctuality requirements;
- ☐ health requirements;
- ☐ safety rules;
- ☐ service awards and the criteria under which they are awarded;
- ☐ social activities of the centre;
- ☐ reimbursement of expenses;
- ☐ special privileges and/or fringe benefits of volunteering at the centre.

The appendix contains examples of material that is included in the folder of information given to each new volunteer at the Community Information and Referral Service in Minneapolis, Minnesota.

Some of the Ontario Community Information Centres have designed and printed handbooks for their volunteers. *NIP'S VOLUNTEER HANDBOOK* (Neighborhood Information Post in Toronto) is included in the appendix. It is one example of what can be done to help volunteers inform themselves about the centre and their role in it. If you design a manual or handbook for your centre, a loose-leaf notebook can be updated easily and economically.

Supervision of New Volunteers

Supervision may be defined as an administrative process with an educational purpose. The intent of supervision is to help the person fit the centre's program, learn to do a competent job and to continue to grow.

Anyone who is new to a job needs support, direction, clarification of expectations and feedback on his/her performance. You should provide supervision on a regular basis, not only when things go wrong, to ensure that the goals of the centre are met and that the volunteer is learning the job. It is also important to approach supervision in a positive and supportive way, rather than in a punitive or critical manner.

Supervision is:

WHAT	HOW	WHY
Selecting people	tactfully	in order to motivate
Interesting people	fairly	them to do their
Teaching people	patiently	assigned tasks ...
Correcting people		skillfully, accurately,
Commending people		intelligently,
Rewarding people		enthusiastically,
Harmonizing people		completely.

Supervision takes time.
Be sure to allow time in the working day or week of a staff person or experienced volunteer to supervise the new volunteers. The task of supervision should be part of that person's formal job description.

If you are responsible for volunteer selection, training and/or supervision, ask yourself these questions:

☐ Has one person in your program, either paid staff member or volunteer, been given authority as the over-all director of volunteer activities?

☐ Is the chain of command in your volunteer organization clearly outlined?

☐ Do your volunteers know to whom they should report for work, give notice when unable to be present, turn for help and advice?

☐ Do they know where and when they can find their supervisor?

☐ Is there always some experienced, responsible person present to assist new volunteers and to show them what to do?

☐ Do you keep track of how volunteers progress in their assignments through interested observation, through simple attendance records, through personal conferences?

☐ Do you tell the volunteers when they are doing a good job?

☐ Do you try to help volunteers in their performance by increasing their interest, instilling confidence, providing further training?

☐ Are the channels of communication always open between your volunteers and their supervisors?

Effective supervisors will have:

☐ personal commitment to the organization;

☐ enthusiasm;

☐ understanding and empathy for other people;

☐ flexibility;

☐ freedom from bias (or at least awareness of what their biases are and the ability to prevent them from affecting the job);

☐ ability and willingness to listen to all points of view and to come to a decision after knowing all the facts;

☐ ability to inspire and teach others to use all their capabilities;

☐ respect for the rights of co-workers;

☐ willpower to stand up for what they believe to be right;

☐ ability to accept and be prepared for disagreement with personal ideas;

☐ willingness to accept the decision of the group, even if they personally disagree;

☐ ability to recognize that leadership is not limited to a select group.

There are techniques of handling people which will help a supervisor to become more effective. Arthur Pell states:

> *A good leader must understand the psychology of human beings. He should have a good knowledge of what a person seeks from work and how it can be applied to the job at hand.*

Some of the factors that are particularly applicable to understanding and working well with the volunteer are:

☐ **The need for recognition as an individual** ... The supervisor must know each of the people in the group, (names, family situation etc.) and must learn to recognize the quirks and qualms of each; what excites or bores him or her. Knowing his/her personal interests and likes as well as his/her biases and dislikes will help the supervisor work more effectively.

☐ **The need for accomplishment** ... As volunteers receive no monetary reward for their work, their pay comes from a feeling of accomplishment. They want to take pride in their work. The leader should keep morale high. Make the volunteers feel wanted and part of a working team. Praise them for work well done; welcome volunteers back after an absence — let them know they have been missed; show them how their specific work helps the organization achieve its goals.

☐ **A sense of belonging** ... The volunteer organization can capitalize on this psychological need, as the work of the organization lends itself to this by common goals and organized activity.

☐ **The need for fair treatment** ... A leader must treat everyone fairly in every way. Favoritism is the greatest of all demoralizers. People who see favoritism in an organization become quickly disillusioned. Fair treatment pays dividends in greater co-operation and in more consistent efficiency. One of the most frequent complaints in organizations is that there are in-groups who exclude others from full participation. Persons not in this clique resent it bitterly and usually leave. Good leaders avoid cliques and welcome all volunteers to serve and work closely with the others.

☐ **The need to be heard** ... Persons who have real or imaginary grievances need to express them. Encourage this expression. If grievances fester, the person will become unhappy and either rebel, cause disruption or leave. The good leader should listen to every gripe, never brush it off without investigating the complaint and pacifying the aggrieved.

☐ **The need to maintain status** ... The leader should remember that people are concerned about their status — they do not like to "lose face." Never do anything to make them feel inferior or indicate they will lose status by doing certain types of work. If a menial job has to be done, it should be treated as a necessary part of the organization's work; everyone in the section should share in it. In this way no one will feel offended by being assigned this task.

Evaluation of Volunteer Performance

Regular evaluation is an integral part of promoting the health of any program or person — it is both preventive and remedial medicine. Although both the volunteer program and the individual volunteers should be involved in an evaluative process, we will discuss primarily evaluation of the individual volunteer.

Individual evaluation must be made in relationship to the whole organization and its volunteer program. To help keep the evaluation of individuals in proper perspective, first answer these questions about your centre.

☐ Does your total program plan include an occasional stock-taking of your volunteer services and how effective these are?

☐ Do you evaluate the situation in which the volunteers work as well as their performance?

☐ Are volunteers an asset to your program? Have they: enriched existing services ... made possible the extension or expansion of services ... inaugurated new services?

☐ If your volunteers seem to be liabilities, have you considered new approaches to convert them into assets?

☐ In evaluating your volunteer operation, do you include: a look at its structure ... a re-examination of volunteer assignments ... an assessment of staff time put in as measured against volunteer performance?

☐ Do the volunteers themselves — as well as your paid staff and administration — participate in the evaluation?

☐ Have you considered calling in outside consultants to keep the evaluation more objective?

☐ Are you prepared to accept the recommendations of an objective evaluation and see to what extent your program can adopt them?

☐ Do you encourage staff members to: attend workshops on how to work with volunteers ... share ideas with supervisors of volunteers from other programs and areas of service?

Ideally, individual evaluation of volunteer performance should be a regular process — every six or 12 months. We recommend mutual evaluation involving the volunteer, the supervisor and the person responsible for the volunteer program. The first evaluation should take place at the end of the three-month trial period. At that point a decision should be reached as to whether this is the best placement for the volunteer. If it is, then schedule regular evaluations in the future.

Evaluation can and should be a format for commending, correcting, rewarding and redirecting if necessary. Use the original job description as the starting place; then let the evaluation revolve around the volunteer's development in relationship to it.

One of the finest evaluation processes is used by LINK of the North York Public Library. A self-evaluation form is mailed to each volunteer with a covering letter to explain how to use and respond to the form. After the volunteer has filled out the form, he/she is invited to a private interview with the director to discuss the self-evaluation. In that interview the director responds to the individual's perception of himself and his performance as a volunteer at LINK. If the director agrees with the self-evaluation from observations of the volunteer's performance he/she so states. If the director *disagrees*, he/she tells the volunteer how she disagrees and why. This interview of mutual evaluation is handled as a learning experience for both parties — constructive feedback is shared and a joint decision is made as to whether the volunteer should stay with LINK, and how each can continue to benefit from their association. If it is decided by the volunteer and/or the centre staff that it would be best to terminate the association (a rare, but possible event), every effort is made by the director to help the volunteer understand the reasons for termination and to find a suitable alternative if he or she desires.

A sample of the self-evaluation form used by LINK in North York is included in the appendix. The centre's use of this form suggests it may be of value to personnel in other centres.

Mutual evaluation is a useful tool in planning new training programs and on-going training, but it also has direct results.

☐ The volunteer will continue to work in the centre in essentially the same capacity and with the same basic job description.

☐ The volunteer will continue to work but with a different job description, one that creates a better match between his/her abilities and needs and those of the centre.

☐ The volunteer will enter another three-month probationary period with clear expectations for changes outlined by both himself/herself and the centre director. Another evaluation would be planned for the end of that time to reassess the situation.

☐ The volunteer either decides to leave or is counselled out by the director with other options explored for more appropriate service elsewhere if the volunteer wishes. If not, help is offered to identify available resources to meet his/her needs and an action plan to follow through.

Reassignment of Volunteers

One of the major motivations for volunteering service is the opportunity to learn and grow. A person usually expects to grow and change in a job by moving either horizontally or vertically in the organization. Volunteers are no exception. To ensure maximum utilization of volunteer talent and interest, provide job mobility or reassignment within the centre or elsewhere. When a person changes jobs, even within the same agency, he/she needs a new job induction as well as a new job description.

Moving Volunteers to New Positions

Consider these points:

☐ Are volunteers given a specific assignment for a trial period at the end of which they may continue in the same job, be assigned to another or withdraw from your program altogether?

☐ Do you recognize that misplacement may be the cause of unsatisfactory performance?

☐ Are you prepared to give volunteers another opportunity to use their capabilities productively?

☐ Have you informed volunteers that they may change from one type of service to another, learn additional skills, assume positions of greater responsibility?

☐ Do you make a practice of asking individual and group volunteers who have performed short-term service whether you may call upon them again?

☐ Do you assume that volunteers feel free to terminate their assistance to your program after a reasonably sustained period of service?

☐ Are volunteers who want a change advised where to seek experience in a different program or directed to the volunteer action centre for information?

☐ Do you make sure that all volunteers who are released because they have not worked out, leave with a pleasant feeling toward your program?

Counselling Out: Terminating a Volunteer's Service

As we have pointed out, wise and careful selection of volunteers reduces the need for extensive and intensive training. The same is true in "firing" a volunteer. If the worker has been carefully selected, made a real commitment to the centre and successfully completed whatever training is necessary, it is unlikely the need to "fire" will arise.

Such situations do arise, however, and the centre should be prepared for it. Problems are less likely to occur if the centre and staff are sure why they use volunteers and they deal with the volunteers fairly.

If the necessary qualifications for each job are clearly spelled out and described in simple terms, the chances are good that an unsuitable applicant will be able to quickly accept a "no thanks" in response to his offer to volunteer. The same is true should it become necessary to ask a volunteer to terminate his/her services.

If you can point to specific examples of the volunteer's behavior which do not fulfil the description and requirements of the job, it will be easier to ask him/her to leave. Your reasons will be clear and objective. Do not allow such an event to become fraught with personality clashes and bad feelings.

The separation or parting of the ways will be easier for both parties if it is conducted under the following conditions:

- ☐ The separation and the reasons for it are kept strictly confidential between the volunteer and the centre staff.
- ☐ The volunteer is clearly told why the centre feels their working relationship is not satisfactory and alternatives are opened up for him or her.
- ☐ The volunteer is given plenty of opportunity to state his or her side of the story and air any personal feelings about the centre, co-workers and the requested termination of service. If those feelings can be dealt with adequately by centre staff, the volunteer will have less need to talk about them elsewhere, thereby potentially creating problems in the eyes of the public.
- ☐ Volunteers asked to leave their jobs have the right to expect help in making the transition and centre staff has the responsibility of providing that help.

Termination of services should never come as a total surprise to the volunteer. During the trial period, in the process of supervision, the volunteer should be made aware if things are not working well. Be sure he/she is aware of what specific changes must be made in order to perform the job satisfactorily. Allow adequate time for changes to occur — again with close supervision. If the desired change is not possible, then you can justify and fairly ask the volunteer to terminate his/her service with you.

Conclusion

Remember, to make your volunteer program work you must:

- ☐ describe the job accurately. Every volunteer should know what is expected of him or her, not only in direct service, but also in training sessions, supervision, meetings. Volunteers won't stay if they come in expecting one thing and then discover that the job is actually very different.
- ☐ offer a well-planned program of training and supervision. This is not a question of program development. This is viewed by the volunteer as a matter of right. Don't get volunteers unless you can provide them with the training by which they will be able to do the job under proper supervision.
- ☐ concern yourself with the volunteer as a person, not as an object. Do not make the mistake of equating volunteers with untrained persons. They may not be trained specifically for that agency, but very often they have extensive training in other fields. They may require additional training but many begin with a valuable base of knowledge and experience.
- ☐ let the volunteer know he has made a contribution and that this contribution is appreciated. There is a place for testimonials, certificates, etc., provided they are not given wholesale, and provided they are given in a setting which indicates they are valuable, not something casual.
- ☐ do not confuse the volunteer with jargon. Sometimes language is used to obstruct rather than to communicate, to confuse rather than enlighten. Don't use professional terms simply to impress the volunteer with the fact that you are a learned individual. The goal is partnership. Don't set up barriers between professional and volunteer.
- ☐ have a meaningful place for the volunteer. Once the person has indicated his willingness to volunteer he should be immediately involved in a program designed to fulfil an agency service commitment.
- ☐ give the volunteer a significant task. Don't create work just to keep volunteers busy. Don't use volunteers in menial tasks when they are coming to the agency expecting and willing to do much more.
- ☐ inform the volunteer. Let him/her know what is happening in the agency as he/she is working. Let him/her know he/she is not by himself/herself, that he/she is not just working with a single individual in the agency program. The volunteer is a staff member and should be treated as such.
- ☐ evaluate with the volunteer. Just as a volunteer is entitled to have a job description he/she is entitled to an evaluation of his/her work. Let him/her know how he/she is doing. The volunteer is entitled to know if he/she has failed the expectancy of the agency and how he/she has failed.
- ☐ trust the volunteer. You can not work with people whom you can't trust, and they can not work with you if they are mistrusted.

Excerpted from *Ten Commandments for Working With Volunteers* by Daniel Thursz

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